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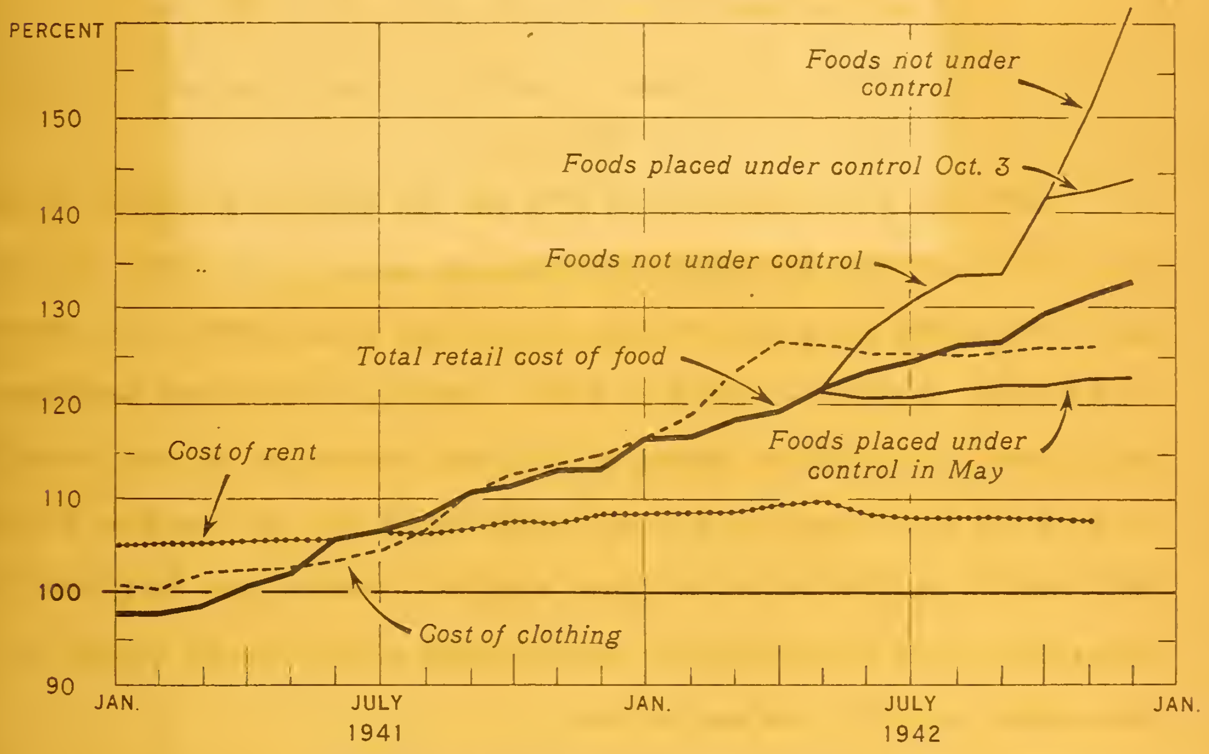
THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-3 BAE JANUARY 1943

RETAIL COSTS OF FOOD, CLOTHING, AND RENT, UNITED STATES, 1941-42

INDEX NUMBERS (1935-39=100)



BASED ON DATA FROM BUREAU OF LABOR STATISTICS

U. S. DEPARTMENT OF AGRICULTURE NEG. 42822 BUREAU OF AGRICULTURAL ECONOMICS

The cost of living has been steadily rising for the past 2 years. (See table 2). The rise in food prices is still continuing but the price controls now placed on most foods have tended to slow down the rate of increase. The rises in foods of the uncontrolled items after May were partly seasonal in nature. The uncontrolled items after October 3 include fresh fruits and vegetables, peanut butter, and fresh and frozen fish. Price controls placed on clothing and rent seem to have been more effective in curtailing the rise in the cost of these items.

THE NATIONAL FOOD SITUATION

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Summary

Although food production in 1942 was the largest on record, present indications are that with average yields for the important crops and with the continued upward trend in livestock production, total agricultural production in 1943 will exceed the output in 1942. However, military and lend-lease requirements and civilian demand in 1943 are expected to be much larger than in 1942 and total supplies of food for civilians will be less than in 1942. With careful utilization of existing supplies, however, and rationing of scarce commodities, the food available to civilians in 1943 should provide a reasonably adequate diet per capita.

While the average per capita supply of food for civilians will be less than in 1942 it is not likely to fall significantly below the 1935-39 average. Moreover, with fewer people in the lower income groups, and with rationing of important commodities, a larger percentage of the population may be better fed in 1943 than in the past.

The volume of food production in 1942 was 11 percent above 1941 and 28 percent above the average for 1935-39. The greatest increases came from truck crops, sugar crops, meat animals, and poultry. Over 12 percent of the food produced in 1942 for human consumption went to our military forces and our Allies. Our armed forces and our Allies together received about 10 percent of the beef, 20 percent of the pork, 15 percent of the eggs, 8 percent of the butter, 32 percent of the cheese, 20 percent of the condensed and evaporated milk, 25 percent of the lard, 10 percent of the other edible fats and oils, 4 percent of the wheat, 5 percent of the rice, 30 percent of the canned fruits and juices, 35 percent of the dried fruits, and 25 percent of the canned vegetables.

Advancement in the science of nutrition in the past few decades has resulted in large demands on the part of both the military forces and our Allies for the so-called protective foods which are now also demanded in larger quantities by the civilian population. The heaviest demands of the armed forces and our Allies, moreover, are for those protective foods which are or can be manufactured in concentrated form and can be shipped easily.

The unusually large civilian demand for foods is a result of increased employment, increased purchasing power, and more strenuous work for a large section of the population. Spendable income for 1942 is estimated to have been about 23 percent above 1941 and 69 percent above the average for 1935-39. With larger incomes and with price ceilings placed on most foods, consumers are willing to buy more than in the past. The demand for foods is further accentuated by the inability of consumers to spend their excess money on durable goods, many of which are no longer available. Even with the increased production, the large military and lend-lease requirements and the increased civilian demand result in local and over-all shortages in various foods. Transportation difficulties, differentials in price ceilings which tended to move foods to those regions where the prices were relatively high, and an abnormal concentration of people in defense areas have contributed to shortages in certain localities. Shortages led to rationing in 1942 of some commodities (sugar and coffee) and announcement of rationing of meats and processed fruits and vegetables in 1943. To meet the war needs the Government has also issued reservation orders for meats, butter, fish, fats and oils, and canned fruits and vegetables which limit the amount producers can release for civilian consumption.

Even though the supply of some commodities in 1942 was smaller than the quantity consumers would have taken at the prevailing prices, the per capita food consumption for the Nation as a whole was much higher than in the pre-war period and only slightly lower than the record high per capita consumption in 1941.

Present estimates of 1943 agricultural food production are based upon the production goals announced by the Department of Agriculture, present conditions, and the assumption that weather in the growing season will be average. Weather as favorable as that experienced in 1942 would increase the production of foods, unfavorable weather would reduce it below expectations. Attainment of all the production goals would result in a total food production about 7 percent above 1942, and 37 percent above the average for 1935-39.

Attainment of the production goals, however, will not guarantee a sufficient food supply to satisfy the abnormal civilian demand, or a civilian supply equal in all lines to the consumption of the recent past. Both military and lend-lease requirements will be much larger in 1943 than they were in 1942. Preliminary estimates indicate that these requirements will account for approximately one-fourth of the total food produced for human consumption, and they will continue to be heavily weighted by the protective foods.

In terms of the prospective production of specific commodities, the combined military and lend-lease requirements will probably account for 20 to 25 percent of the beef, 35 to 40 percent of pork, 25 to 30 percent of eggs, 15 to 20 percent of butter, 40 to 45 percent of cheese, 40 to 50 percent of condensed and evaporated milk, 25 to 30 percent of lard, 20 to 25 percent of other edible fats and oils, 50 to 60 percent of canned fruits, 35 to 45 percent of dried fruits, 45 to 50 percent of canned vegetables, 10 to 15 percent of wheat, and 15 to 20 percent of rice.

Present estimates of consumption, moreover, are based on per capita averages for the entire Nation, and because of certain factors of maldistribution will not give an exact picture of the situation for all areas. Such factors as black markets, transportation difficulties, growth of war production centers, and military camps will contribute towards giving some areas more than their per capita share, others less than their per capita share.

Consumers' spendable income in 1943 probably will be 10 to 15 percent larger than in 1942 and 85 to 90 percent larger than the average for 1935-39. The quantity of durable goods available for civilians in 1943 will further decline and thereby release more money for food purchases. In short, the supply of many foods for civilians will be limited, and because of the large demand at the established ceiling prices, rationing of additional scarce foods may have to be instituted to insure an equitable distribution.

-- January 28, 1943

Table 1.- Volume of agricultural production for sale and for consumption in the farm home, and civilian per capita food consumption, 1939-42

Index numbers (1935-39 = 100) 1/

Crop	1939	1940	1941	1942 2/
Food grains	101	110	131	138
Truck crops	106	111	115	127
Fruits	111	110	114	114
Vegetables, excluding truck crops	99	101	102	105
Sugar crops	106	104	97	113
Total food crops	105	109	117	124
Meat animals	109	118	118	139
Poultry	108	109	115	128
Dairy products	102	105	110	116
Total food livestock	106	112	115	129
Total food production	106	111	115	128
Total agricultural production	106	110	113	127
Civilian per capita food consumption	103.1	105.3	110.9	110.6

1/ Index numbers for earlier years were given in the October 1942 National Food Situation. The quantities included in the index are weighted by the farm price in the base period and consequently percentage increases based on these index numbers may not correspond to increases based on unweighted total production.

2/ Based on December estimates of crop production, estimated marketings, and home consumption of livestock and livestock products for the calendar year 1942.

REVIEW OF THE 1942 FOOD SITUATION

The phenomenal increases in agricultural food production in 1942 (table 1) were due to great efforts on the part of the farmers, abnormally good weather, comprehensive production and price-support programs formulated by the Department of Agriculture, and relatively high farm prices. The unusually favorable weather helped to increase the 1942 production, but the adjustment of production to a wartime basis was largely a result of the agricultural production programs set up by the Department of Agriculture and the full cooperation given by the farmers to these programs.

In April 1941, the Department of Agriculture announced price supports to encourage the production of hogs, dairy products, chickens, and eggs. Steps also were taken to maintain and encourage the production of corn for feeding. After Pearl Harbor, the Secretary of Agriculture announced a comprehensive farm program and price supports to stimulate further production of these products as well as to increase the production of evaporated milk, dry skim milk, cheese, dry edible beans, dry peas, peanuts, soybeans, and flaxseed.

The reported acreage of important wartime food crops has in many instances exceeded the 1942 goals, but in others has fallen short of the goals. However, in all cases the production has been larger than in 1941 (table 2). Compared with 1941, the soybean acreage harvested for beans increased 83 percent (20 percent above the goal), the flaxseed planted acreage increased 35 percent (4 percent above the goal), the dry edible bean planted acreage decreased 5 percent (18 percent below the goal), the dry field pea planted acreage increased 40 percent (25 percent below the goal), and the harvested acreage of peanuts increased 93 percent (26 percent below the goal). In terms of production, soybeans harvested for beans increased 98 percent over 1941, flaxseed production 26 percent, dry edible beans 6 percent, dry field peas 94 percent, and peanuts 70 percent.

Total livestock for food, which is of prime importance in the war, has shown a great increase over 1941. Production of beef and veal increased 9 percent (4 percent above the goal), lamb and mutton 15 percent (13 percent above the goal), pork 15 percent (2 percent below the goal). Total farm production of milk increased 3 percent, but was still 4 percent below the goal. Within the dairy products group, production was adjusted to secure increases in the important lend-lease products such as cheese, dry skim milk, and dry whole milk. The production of butter was decreased after it became apparent that the desired production of the other dairy products could be obtained only by such action. Cheese production increased 18 percent over 1941, evaporated milk increased 9 percent, dry skim milk for human consumption increased 55 percent, and fluid milk and cream increased 7 percent. However, butter production decreased 5 percent, and the production of condensed milk decreased 10 percent. Both chicken and egg production expanded about 15 percent, the former reaching the goal, and the latter exceeding the goal by 5 percent. Relatively high prices for livestock and the augmented demand for feed contributed to a 4 percent increase in corn acreage, which, along with favorable weather and the use of hybrid seed, expanded corn production 19 percent.

The production of major commercial vegetable crops for market increased 10 percent and the production of major commercial vegetable crops for processing increased 13 percent. The production of dried fruits increased 9 percent while the production of canned fruits (excluding juices) was reduced 5 percent. The total canned vegetable pack increased 7 percent. These adjustments have been in line with lend-lease needs and restricted tin supplies.

The average per capita consumption of food in 1942 almost reached the record per capita consumption in 1941 in spite of shortages in several important commodities. Considering the increased purchasing power, the per capita consumption probably would have been even higher than in 1941 had the supply been large enough to meet the demand at the prevailing ceiling prices. The per capita consumption in 1942 of most major food commodities (except fish, butter, fruits other than citrus, potatoes, dry

Table 2.- 1942 goals for major wartime crops and livestock products compared with production in 1941 and 1942.

Item	1942 goal	1941 acreage	1942 goal as percentage of 1941	1942 acreage	1942 acres as percentage of 1941	1942 acres as percentage of 1942 goal	1942 production as percentage of 1941 production
	1,000 acres	1,000 acres	Pct.	1,000 acres	Pct.	Pct.	Pct.
Crops 1/							
Soybeans	9,000	5,881	153	10,762	183	120	198
Flaxseed	4,500	3,470	130	4,691	135	104	126
Peanuts	5,000	1,914	261	3,690	193	74	170
Rice	1,320	1,263	105	1,505	121	114	129
Dry edible beans ..	2,600	2,255	115	2,135	95	82	106
Dry peas	665	359	185	501	140	75	194
Potatoes	3,060	2,768	111	2,793	101	91	104

Item	1942 goal	1941 production	1942 goal as percentage of 1941	1942 production	1942 production as percentage of 1941	1942 production as percentage of 1942 goal
	Mil. lb.	Mil. lb.	Pct.	Mil. lb.	Pct.	Pct.
Livestock products						
Beef and veal 2/	9,585	9,130	105	9,980	109	104
Lamb and mutton 2/	940	925	102	1,060	115	113
Pork 2/............	11,125	9,451	118	10,860	115	98
Lard	2,820	2,282	124	2,500	110	89
Milk 3/	125,000	115,498	109	119,412	103	96
Eggs 4/	4,200	3,829	110	4,396	115	105
Chickens 2/	3,118	2,722	115	3,118	115	100

1/ Planted acres, except soybeans and peanuts, which are harvested acres.
2/ Dressed weight.
3/ Production on farms, including milk fed to calves.
4/ Total production.

edible beans, dry peas, sugar, coffee, and cocoa) was larger than in the pre-war period 1935-39. The increases were particularly noticeable in beef, lamb and mutton, pork, poultry, cheese, condensed and evaporated milk, ice cream, fluid milk and cream, citrus fruits, and fresh vegetables. Compared with 1941 the per capita consumption in 1942 was about the same or larger for eggs, poultry, butter, cheese, condensed and evaporated milk, ice cream, fluid milk and cream, citrus fruits, canned juices, frozen fruits, fresh vegetables, potatoes, and dried peas. The per capita consumption, however, was less than in 1941 for meats, fish, fats and oils, fresh fruits other than citrus, canned fruits, dry fruits, dry edible beans, sugar, coffee, and cocoa.

While the average per capita consumption of food in 1942 was relatively high, the supply was not equally distributed among all individuals. Families and individuals in the lower income groups had a poorer diet in 1942 than in the pre-war period. The generally higher cost of living and the higher cost of foods reduced their purchases of the more nutritious foods. However, the number of people in 1942 who belonged to the lower income groups was much smaller than in the pre-war period and, as a result, a larger proportion of the population could afford to buy larger quantities and better qualities of food than they had in the past.

Meats

Preliminary year-end estimates indicate that the production of meats in 1942 was close to 22 billion pounds, about 12 percent above 1941, 35 percent above the average for 1935-39, and slightly above the 1942 production goals. The greatest increase was in the production of pork which was 15 percent above 1941 and 48 percent above the 1935-39 average. Total pork production, however, was somewhat below that called for in last year's goals, but this was more than offset by a greater output of beef, veal, lamb, and mutton than was requested.

Although exact estimates of the quantity of meat bought by Government procurement agencies in 1942 are not available, such purchases probably totaled close to 4 billion pounds, leaving a supply for civilians of a little over 18 billion pounds, equivalent to about 141 pounds per person. This was a little less than the large 1941 per capita consumption, but it was substantially greater than the 1935-39 average of 126 pounds.

Despite this relatively large average per capita consumption, serious meat shortages were encountered during the past year in many sections of the country. This was due in part to rather heavy buying for the armed forces in some months, to large concentrations of people in defense areas, to ceiling price differentials between regions, and more particularly to the large civilian demand resulting from a sharp increase in consumer purchasing power. Maximum wholesale and retail prices for most meats were established by the Office of Price Administration in May of last year, which prevented meat prices from advancing along with the expanded demand, and consumers in general were financially able to buy more meat than was available.

In the latter part of 1942, the Office of Price Administration took steps to adjust inequities in the meat price ceilings by establishing specific dollar and cents ceilings for pork and beef. These revised ceilings contained regional differentials based upon actual transportation costs between surplus and deficit producing areas.

With the combined war and civilian demands for meats far exceeding the production in the second half of the year, Government procurement agencies had difficulty in meeting military and lend-lease requirements. The meat limitation order which became effective in the last quarter of 1942 was designed to relieve this situation. This order limited supplies of commercially produced meats (excluding farm and retail slaughter) which could be distributed in civilian channels to 70 percent of the beef, 75 percent of the pork, 100 percent of the veal, and 95 percent of the lamb and mutton distributed in the corresponding period of 1941. At the same time civilians were urged to hold their consumption of meat voluntarily to 2-1/2 pounds per person per week.

Fish

The total catch of fish in 1942 was 22 percent below the 1941 catch and 14 percent below the average for 1935-39. Production of frozen fish continued high in spite of reduced margins due to price ceilings. Production of canned fish in 1942 was about 25 percent below the 1941 pack. Large Government purchases of canned fish for lend-lease and military use (about 55 percent of the total production) further reduced the limited supply on the market. Early in the year, packers were forbidden to sell canned salmon, pending Government purchases for lend-lease and military requirements. On September 30, 1942 about 60 million pounds were released for civilian consumption and another 60 million pounds were held by manufacturers as stocks for possible future release. The per capita consumption of fresh, frozen, and canned fish in 1942 was about 11 pounds, which was about 23 percent less than in 1941 and 17 percent less than the average for 1935-39.

Poultry Products

Eggs: Production of eggs in 1942 totaled about 4.4 billion dozens which is 15 percent above 1941 and 32 percent above the average for 1935-39. Military and lend-lease requirements accounted for about 15 percent of the production. The supply for civilian consumption is estimated to have been 317 eggs per person. This is about the same as in 1941 and about 5 percent larger than the average for 1935-39.

Poultry: The 1942 production of poultry was a record. The production of chickens was over 3 billion pounds (dressed weight) or about 15 percent above 1941 and about 29 percent above the average production in 1935-39. Production of turkeys totaled about 485 million pounds (dressed weight) which is about 2 percent above the 1941 production but about 39 percent above the average for 1935-39. Only a small fraction of the production of poultry went to lend-lease, and the military forces have taken only about 4 percent. The per capita supply of poultry (chickens and turkeys) for civilian consumption is estimated to have been about 26 pounds -- 11 percent above 1941 and 23 percent above the average for 1935-39.

Dairy Products

The total 1942 production of milk for human consumption was 119 billion pounds. This is about 3 percent above 1941 and 15 percent above the average for 1935-39. Of the dairy products as a group, the 1942 production of cheese, condensed and evaporated milk, ice cream, and fluid milk and cream increased over 1941, while the production of butter declined about 5 percent.

The total 1942 civilian per capita supply of milk for human consumption was 852 pounds, about 5 percent above 1941 and about 6 percent above the average for 1935-39. The per capita supply for civilian consumption of almost all dairy products was higher in 1942 than the high consumption in 1941 in spite of large demands by the military forces and our Allies for such products as cheese, butter, and evaporated milk. The consumption of fluid milk and cream increased sharply in the second half of 1942 and the demand for fluid milk is expected to be unusually high in 1943, partly as a result of the shortage of other beverages.

Fats and Oils (Excluding Butter)

The total 1942 production of edible fats and oils (excluding butter) was over 5 billion pounds, or 1.5 percent above the 1941 production and 20 percent above the average for the period 1935-39. Lard production increased about 10 percent and margarine about 17 percent. The production of vegetable compounds and other fats and oils declined about 8 percent. The civilian consumption of edible fats and oils was restricted in the last quarter of 1942 by a limitation order issued by the War Production Board. The order required each manufacturer of food products using 6,000 pounds or more of fats and oils quarterly to limit his use of fats and oils to a specified percentage of the average use in 1940 and 1941. This limitation order and the large war requirements for the year as a whole reduced the civilian per capita consumption of all fats and oils (excluding butter) about 8 percent below 1941, although consumption was still 4 percent above the average for 1935-39. Margarine is the only product in the fats and oils group for which consumption increased (about 7 percent) over 1941.

Vegetables

The total production of major commercial truck crops for fresh use and vegetables for processing was of record size in 1942. In general the large production resulted from high yields although the acreage of some major processing crops was substantially increased over 1941. The 1942 dry edible bean and pea crops were the largest on record. Production of potatoes and sweetpotatoes was somewhat higher than in 1941.

The civilian per capita consumption of fresh vegetables (excluding melons) was about 175 pounds, about 5 percent higher than in 1941. Because of tin restrictions and Government reservations, the per capita consumption of canned vegetables (including bulk kraut and pickles) was only about 37 pounds or about 12 percent less than in 1941. The tin restrictions eliminated the canned pack of some vegetables completely and greatly reduced the pack of others. Government requirements amounted to about 25 percent of the 1942 total canned vegetable pack.

The civilian per capita consumption of potatoes in the fiscal year 1942-43 is estimated at 124 pounds, which is about the same as in 1941 but about 7 percent less than the average for 1935-39. The civilian per capita consumption of dry edible beans and peas for the crop years 1942-43 is estimated at 8.0 pounds compared with 8.7 pounds in 1941 and an average of 9.8 pounds for 1935-39.

Government price supports at the cannery level stimulated the production of canned peas and tomatoes. Canned peas increased from 28.7 million cases to 35.3 million cases over 1941 and canned tomatoes increased about 1.3 million cases. Potato prices were supported by the Government at the f.o.b. level. However, few purchases were made as the price of potatoes exceeded the support levels. Prices of dry edible beans and peas were supported f.o.b. country shipping points at 85 percent of parity and later when the 1942 crop came in were raised to 90 percent of parity.

Fruits

While the production of citrus fruits (for fresh use) is estimated to be of record size in 1942-43 (about 14 percent higher than the production in 1941-42) the production of other fresh fruits was about 10 percent below 1941-42. The production of canned fruits declined about 5 percent below 1941 while the production of canned juices increased about 40 percent over 1941-42. Lend-lease and military requirements amounted to over 30 percent of the 1942-43 total pack of canned fruits and juices. The civilian demand for canned fruits at the prevailing ceiling prices has been exceptionally high and far exceeded the rate of production for civilian use. This situation threatened to deplete the stocks of canned fruits and juices before the 1942 pack reached the market. To avoid this, the War Production Board issued an order prohibiting canners from shipping more than a specified percentage of their packs available for civilian consumption during certain periods.

The 1942 per capita consumption of fresh fruits other than citrus was about 82 pounds, a decline of about 16 percent below 1941 and 20 percent below the average for 1935-39. The per capita consumption of canned fruits was about the same as in 1935-39 but about 4 pounds less than in 1941. The per capita consumption of canned juices, however, increased from 6.7 pounds in 1941 to 7.8 pounds in 1942.

Grains

The 1942 wheat crop was the second largest on record, the rye crop the largest since 1935, and the rice crop an all-time record. The combined 1942 production of corn, oats, and barley was estimated December 1 to be 121 million tons, 17 percent larger than in 1941 and 39 percent above the 1935-39 average.

The 1942 apparent civilian consumption of wheat for food use is estimated at about 220 pounds per capita compared with 224 pounds in 1941 and an average of 222 pounds for the period 1935-39. The apparent civilian per capita consumption of rye for 1942 is estimated at 3.9 pounds compared with 3.8 pounds in 1941 and an average of 3.9 pounds for 1935-39. The apparent civilian per capita consumption of rice is estimated at 5.4 pounds compared with 5.7 pounds in 1941 and an average of 5.8 pounds for 1935-39.

Sugar

Domestic production of sugar crops in 1942 increased 13 percent above the average for 1935-39, and 16 percent above 1941. Production of cane and beet sugar, constituting 80 to 85 percent of our sugar crops, increased 17 percent above both 1935-39 average and the 1941 crop. No acreage goal was set for 1942, but farmers responded to wartime demands by increasing acreage of sugar beets 10 percent over the 1935-39 average, and 30 percent over 1941. Sugarcane acreage was increased 31 percent over the 1935-39 average and 14 percent over 1941.

Civilian consumption of sugar increased rapidly during 1941 and the early part of 1942. Because of the uncertainty in maintaining supplies under wartime conditions, the use of sugar in manufactured products was somewhat restricted as early as December 1941, and consumer rationing went into effect in May 1942. At the same time more stringent regulations were imposed on manufacturers using sugar. Per capita civilian consumption for the year as a whole was 87.3 pounds, 10 percent below the 1935-39 average, and 17 percent below 1941.

Military and lend-lease requirements took 26 percent of the domestic production or 6 percent of the total supply.

RETAIL FOOD COSTS DURING 1942

The Bureau of Labor Statistics index of retail food costs increased from 116.2 percent of the 1935-39 average in January 1942 to 132.7 percent in December (table 3). This is an increase of about 14 percent or slightly more than 1 percent per month. The index increased approximately 7.7 percent from mid-June, the first reporting date after the effective date of the General Maximum Price Regulation to mid-December. The greatest increase in any 1 month was 2.4 percent, the increase from September 15 to October 15. The Bureau of Labor Statistics retail food cost index in December was 1.2 percent above November, 2.4 percent above October and 17.3 percent above December of last year. From December 1941 to December 1942, meat prices increased 19.9 percent, eggs 21.1 percent, dairy products 9.8 percent, and fruits and vegetables 32.7 percent.

Under the General Maximum Price Regulation, approximately 60 percent of the total family food bill was made subject to maximum price controls. In October an additional 29 percent of the total was placed under control, so that at the present time foods accounting for about 89 percent of the total food indexes as reported by the Bureau of Labor Statistics are subject to maximum price regulations. Foods accounting for 11 percent of the total are as yet not subject to control. (See pages 34 to 36.)

While the 1942 price controls tended to slow down the rate of increase in the costs of all foods, both the controlled and uncontrolled items steadily increased during the year. The upward movement, however, was considerably larger in the uncontrolled group. (See chart on cover page.)

The difference between increased cost of the controlled and uncontrolled items is not entirely due to price ceilings. Seasonal and other

Table 3.- Index numbers of retail food prices and total cost of living, United States, specified periods (1935-39 = 100)

Year and month	Meats	Eggs	Dairy products	Fats and oils	Cereals and bakery products	Fruits and vegetables				Sugar	All foods	Total cost of living
						Fresh	Canned 1/	Dried	Total			
1940	96	94	101	82	97	97	92	101	96	97	97	100
1941	108	112	112	94	98	104	98	107	103	106	106	105
1940												
Oct.	99	111	102	80	95	87	92	99	88	95	96	100
Nov.	97	115	103	80	95	86	91	100	87	95	96	100
Dec.	97	112	107	80	95	90	91	100	90	95	97	101
1941												
Jan.	101	97	105	80	95	93	91	100	93	95	98	101
Feb.	102	85	104	81	95	96	92	100	96	96	98	101
Mar.	102	83	105	81	95	98	92	99	97	98	98	101
Apr.	104	92	106	85	95	102	93	100	101	105	101	102
May	104	94	108	88	95	106	94	103	104	107	102	103
June	107	104	110	92	96	116	96	105	112	107	106	105
July	109	115	112	97	96	109	98	106	107	108	107	105
Aug.	111	121	114	99	99	104	100	109	103	109	108	106
Sept.	116	133	118	103	101	99	102	111	100	112	111	108
Oct.	113	137	120	106	102	104	104	113	104	112	112	109
Nov.	110	146	121	107	102	111	105	116	110	113	113	110
Dec.	111	138	120	108	102	111	106	118	110	114	113	110
1942												
Jan.	116	131	122	111	103	119	109	122	117	118	116	112
Feb.	118	119	122	114	104	118	115	125	118	128	117	113
Mar.	120	112	122	117	105	124	121	128	123	128	119	114
Apr.	122	111	122	120	105	126	122	131	126	128	120	115
May	124	115	123	122	105	130	123	131	129	127	122	116
June	127	120	122	120	105	137	122	133	134	127	123	116
July	128	130	123	120	105	139	122	134	136	127	125	117
Aug.	130	146	125	120	105	135	123	139	133	127	126	118
Sept.	131	155	128	121	105	130	124	143	130	127	127	118
Oct.	131	165	131	121	106	139	125	150	137	127	130	119
Nov.	132	166	132	124	106	145	127	150	142	127	131	120
Dec. 2/	133	167	132	125	106	151	128	150	147	128	133	120

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Canned weight.

2/ Preliminary.

factors were responsible to some extent for the rapid increase in the uncontrolled groups (National Food Situation, October 1942).

In addition to the "visible" increases in the cost of food, which are reflected by the Bureau of Labor Statistics index, "invisible" and indirect increases which took place throughout the year have also cut into the purchasing power of the consumer's dollar. Such increases took the form of changes in quality, reduction in service at the retail level, marking-up of grades, and the creation of "new" products which were sold at higher ceilings, etc. The inability to buy the brands and quality desired and the necessity to shop at distant centers for the desired items have also contributed to the indirect cost of food. However, some of the indirect costs were unavoidable and in some instances encouraged by the Government as war measures.

FOOD OUTLOOK FOR 1943

Estimates of agricultural production for 1943 are, of necessity, preliminary. While a substantial part of the supply is already determined by the volume of the 1942 crop production and the number of animals on farms, the volume of production of all foods will depend on weather and the maximum utilization of resources for planting, harvesting, breeding, and feeding.

Soil moisture conditions on January 1 were very favorable. With average weather in the main growing season, total food production in 1943 will be larger than the record production in 1942. The production will be still larger if the weather should be as favorable as it was last year. Favorable weather would make a significant contribution to the supply for this year and next. Thus, a production of food crops equal to last year's would result in a total food production 40 percent above the average for 1935-39, and 10 percent (due to increased livestock production) above 1942.

The 1943 goals call for increased production of the major food commodities such as poultry and eggs, milk, potatoes, and beans. Present conditions indicate that the production of fats and oils (excluding butter) will also be larger than in 1942. The 1943 milk production goal calls for a 2 percent increase above last year's record high, despite the fact that the general scarcity of labor and strong competition of hogs for feed and labor promise to make it difficult to maintain milk production at the 1942 level unless the weather is unusually favorable and strong measures are taken to provide labor. Even if the milk goal is reached, the production of cheese, condensed and evaporated milk, and ice cream is expected to be below the production in 1942. Production of evaporated milk has been restricted in order to save tin, and ice cream production is being restricted to save milk solids for more vital purposes. Butter production may be about the same or somewhat smaller than in 1942, depending on milk production, while the consumption of fluid milk and the production of dried whole and skim milk is expected to be substantially larger than in 1942. Due to alternating high and low yields the production of fresh fruits, except citrus and apples, may be smaller. As a result of tin restrictions, the production of canned fruits and juices, as well as canned vegetables, may also be smaller. Under the present goals and recently announced incentive payments, the total acreage of commercial truck crops is expected to be larger than in 1942. However, shortages in labor and transportation facilities and probable lower yields per acre may reduce total commercial vegetable production for fresh use to or even below the 1942 level.

Even with the large anticipated production in 1943, assuming average weather, the civilian per capita supply of all food will be less than last year's near-record supply while the prospective demand for most foods will be larger than in 1942. In order to fill large military and lend-lease requirements in 1943 (about one-fourth of the total production) civilians will reduce consumption to the pre-war level, and for some commodities to even lower levels.

On the basis of the present estimates, it appears that the per capita civilian supply of grains (except rice), poultry, fats and oils (excluding butter), fluid milk, and potatoes, will be above 1942. The per capita civilian supply of meats, eggs, fresh fruits, dry beans and peas will be about the same or slightly lower than in 1942. The civilian per capita supply of fish, cheese, butter, condensed and evaporated milk, canned goods, rice, fresh vegetables, sugar, coffee, and cocoa will be lower than in 1942 and some of these supplies may even fall below the pre-war level.

Since a larger section of the civilian population will be in a financial position this year to purchase more foods at the prevailing ceiling prices than they have in the past, purchases of the food items in short civilian supply will not be determined so much by an individual's buying power as it will be by his ability to be first at the market. To avoid inequalities arising from such a situation and also to relieve pressures on price ceilings, rationing of scarce commodities has been inaugurated or announced.

With an equitable distribution of the food supply either through rationing or voluntary sharing, the average diet (with the possible exception of calcium and riboflavin) can meet the nutritional standards recommended by the National Research Council provided maximum utilization is made of existing supplies.

Meats

Because of the record large supply of feed grains and forage harvested during the past season, together with the current high level of livestock production, prospects are good for increasing total meat output from 15 to 17 percent over 1942. According to the December pig survey, the 1942 spring pig crop (now moving to market) was 24 percent larger than the 1941 spring crop, and the 1942 fall crop, which will come to market during the spring and summer of 1943, was 23 percent larger than that of a year earlier. The farm production goals called for a 15 percent increase in this year's spring and fall crop. While no indications are yet available as to the size of the fall crop, breeding intentions reported in the December pig survey point to a 24 percent increase in the number of sows to farrow this spring. Less than half of the pigs raised this spring, however, will come to market in this calendar year.

The 1943 goals for beef and veal production call for a 9 percent increase in the combined output of these meats this year over last. Whether or not this slaughter goal is reached depends to a great extent upon the weather in 1943, which in turn, will have considerable effect upon marketings of cattle from the Range States. High hog prices relative to butterfat prices may encourage the marketing of some cows and heifers which otherwise might be kept for milk. Supplies of grain-fed cattle in 1943 may be about as large as a year earlier, but because of the relatively low premiums for well-finished cattle permitted by the beef ceilings, the number of cattle fed to heavy weights may be reduced.

The scarcity of experienced farm labor in the Range States and higher prices during 1942 encouraged exceptionally large marketings of mature sheep and ewe lambs ordinarily held back for replacement purposes. This resulted in a record large output of mutton and lamb during the past year, which is not expected to be duplicated in 1943. Mutton and lamb constitute only about 5 percent of the total meat supply.

Military and lend-lease requirements will amount to about 30 to 35 percent of the anticipated total meat production this year. To insure the necessary war requirements for meats, the Secretary of Agriculture prescribed and the Office of Price Administration issued a new limitation order to be effective in the first quarter of 1943 which restricts the supplies of commercially produced meats which could be distributed in civilian channels to 70 percent of the amount distributed in the corresponding period in 1941.

Assuming that the 1943 goals for meat production will be reached, the quantity of meat available for civilian consumption during the entire year may be about 138 pounds per capita (dressed weight). This quantity is greater than the average of other recent years and is equivalent to an average of about 2-1/2 pounds (retail weight) per person per week. But in view of the large civilian demands for meat at the prevailing ceilings, meat rationing will be necessary to insure equitable distribution of this supply. Plans are now under way for such a program.

Fish

Unless necessary manpower is retained in the fishing industry and the Government is able to release more boats for fishing, the catch in 1943 is not expected to equal the relatively low catch in 1942. Present indications are that the total supply of fresh and frozen fish may be about 10 percent below the 1942 supply and the supply of canned fish about 15 percent below. Government purchases for lend-lease and the military forces will continue to increase and may amount to about 30 to 35 percent of the total production. The civilian supply of canned, fresh, and frozen fish may be the lowest on record (about 9 pounds per capita).

Table 4.- Apparent civilian consumption of various foods on a per capita basis, 1935-39 average, 1941, 1942, 1943; 1942 as a percentage of the 1935-39 average and 1941; 1943 as a percentage of the 1935-39 average, 1941 and 1942

Commodity	Apparent civilian consumption per capita				1942 as a percentage of		1943 as a percentage of		
	1935-39	1941	1942	1943 1/	1935-39	1941	1935-39	1941	1942
	Lb.	Lb.	Lb.	Lb.	Pct.	Pct.	Pct.	Pct.	Pct.
Meats (dressed weight) ...									
Beef ...	55.1	60.5	60.7	58.8	110	100	107	97	97
Veal ...	8.0	7.9	7.7	6.8	96	97	85	86	88
Lamb and mutton ...	6.7	7.0	7.5	6.7	112	107	100	96	89
Pork (excluding lard) ...	56.5	66.6	64.7	66.0	115	97	117	99	102
All meats ...	126.3	142.0	140.6	138.3	111	99	110	97	98
Fish ...	13.3	14.4	11.1	9.1	83	77	68	63	82
Poultry products									
Eggs ...	37.5	39.3	39.6	38.2	106	101	102	97	96
Chickens (dressed weight)	18.7	20.2	22.8	29.4	122	113	157	146	129
Turkeys (dressed weight)	2.7	3.6	3.6	4.1	133	100	152	114	114
Dairy products									
Total milk 2/ ...	806.4	813.9	851.8	773.2	106	105	96	95	91
Butter 3/ ...	16.8	16.0	16.0	12.8	95	100	76	80	80
Cheese 4/ ...	5.6	6.1	6.4	4.8	114	105	86	79	75
Condensed and evaporated milk ...	16.8	19.0	19.4	16.1	115	102	96	85	82
Ice cream ...	9.6	13.3	15.1	10.0	157	114	104	75	65
Fluid milk and cream 5/ ...	342.3	353.9	380.1	408.3	111	107	119	115	107
Dried skim milk ...	1.9	2.5	2.2	1.6	116	88	84	64	73
Fats and oils (excluding butter)									
Lard ...	11.0	14.3	13.9	15.5	126	97	141	108	112
Cooking compounds ...	11.9	10.6	8.7	8.8	73	82	74	83	101
Margarine ...	2.9	2.8	3.0	4.6	103	107	159	164	153
Other ...	6.3	8.4	7.7	7.4	122	92	117	88	96
Total fats and oils ...	32.1	36.1	33.3	36.3	104	92	113	101	109
Fruits:									
Fresh 6/									
Citrus ...	48.3	57.2	67.8	66.4	140	119	137	116	98
Apples ...	43.0	39.1	36.8	37.8	86	94	88	97	103
Other ...	60.1	58.6	45.2	45.2	75	77	75	77	100
Canned fruits ...	14.9	19.0	14.7	6.8	99	77	46	36	46
Canned juices ...	7.3	6.7	7.8	5.9	107	116	81	88	76
Frozen ...	.8	1.3	1.6	1.6	200	123	200	123	100
Dried ...	7.9	6.0	5.3	5.0	67	88	63	83	94

Continued -

Table 4.- Apparent civilian consumption of various foods on a per capita basis, 1935-39 average, 1941, 1942, 1943; 1942 as a percentage of the 1935-39 average and 1941; 1943 as a percentage of the 1935-39 average, 1941, and 1942 - Continued

Commodity	Apparent civilian consumption per capita				1942 as a percentage of		1943 as a percentage of		
	1935-39	1941	1942	1943 1/	1935-39	1941	1935-39	1941	1942
	Lb.	Lb.	Lb.	Lb.	Pct.	Pct.	Pct.	Pct.	Pct.
Vegetables:									
Fresh 7/									
Leafy, green, and yellow	---	78.6	83.5	69.6	---	106	---	89	83
Tomatoes	---	25.7	25.5	25.8	---	103	---	100	97
Melons	---	38.5	34.0	27.6	---	88	---	72	81
Other	---	63.6	65.1	57.2	---	102	---	90	88
Canned 8/	---	42.0	37.0	23.9	---	88	---	57	65
Potatoes 8/	133.2	124.6	124.0	129.2	93	100	97	104	104
Sweetpotatoes 8/	23.8	21.0	21.4	26.9	90	102	113	128	126
Beans, dry edible 9/	8.8	8.0	7.3	7.3	83	91	83	91	100
Peas, dry edible 9/	1.0	.7	.7	.7	70	100	70	100	100
Sugar (refined)	97.2	105.1	87.3	62.2	90	83	64	59	71
Grains:									
Wheat	222.4	223.8	219.6	231.6	99	98	104	103	105
Rye	3.9	3.8	3.9	3.9	100	103	100	103	100
Rice	5.8	5.7	6.2	5.4	107	109	93	95	87
Corn	54.0	61.0	72.0	71.4	133	118	132	117	99
Oats	6.9	7.1	7.8	8.0	113	110	116	113	103
Barley	21.7	22.6	27.2	27.0	125	120	124	119	99
Coffee	14.0	16.1	13.5	9.6	96	84	69	60	71
Cocoa	4.4	4.8	3.9	3.2	89	81	73	67	82

1/ Based on goals, wherever announced, except for dairy and wheat which are based on present conditions and indications. (Footnote 2 page

2/ Total milk for human consumption.

3/ Butter, farm and factory.

4/ Cheese, excluding cottage, pot, and bakers' cheese.

5/ Milk and cream, in terms of fluid milk equivalent.

6/ Fresh fruits, excluding melons.

7/ Based on urban population figures. Comparable data for 1935-39 not available.

8/ Estimates for the fiscal years.

9/ Estimates for the crop years; cleaned basis.

Dairy Products

Largely as a result of the rapid increase in military and lend-lease demand, the per capita supply for civilian consumption of all milk and dairy products on a milk equivalent basis in 1943 may total only about 773 pounds. The 1935-39 average consumption was about 806 pounds and the 1942 consumption was about 852 pounds. The 1943 milk production goal calls for a 2 percent increase above last year's record high production, although the general scarcity of labor and strong competition of hogs for feed and labor will make it difficult to maintain production at the 1942 level unless weather conditions are again unusually favorable and adequate labor becomes available. Stocks of dairy products at the beginning of 1943 were 35 percent above average. Stocks at the end of 1943 are expected to be 65 percent above average but about two-thirds of the total will be for Government use, so that stocks for civilians may be somewhat below average.

The most important civilian shortages that may be expected in 1943 in dairy products are in butter and cheese, where per capita civilian supplies may be 10 to 20 percent and 25 to 30 percent, respectively, below what was consumed in 1942. The civilian butter shortage may be partially compensated for by somewhat larger supplies of margarine, but the civilian cheese shortage will tend to be aggravated by shortages in meats. Most of the high-grade American cheese will be needed to meet military and lend-lease requirements, and civilian supplies will contain a larger than usual proportion of special or "foreign" type cheese.

The reduction in the total civilian supply of dairy products is not expected to affect seriously the average diet. Cheese never has been a major item in American diets. Average per capita consumption is about 6 pounds per year compared with about 126 pounds for meats. Moreover, the consumption of fluid milk, which has been increasing rapidly in recent months, is expected to be 5 to 10 percent larger in 1943 than in 1942. From a nutritional standpoint, therefore, the amount of calcium, riboflavin, and nutrients other than fats and vitamin A derived from dairy products may be at least as large for civilians as in any other year.

The expected increased consumption of fluid milk is a result of increased consumer incomes and shortages in other beverages. Returns to farmers are usually higher for milk in fluid form than for milk used in manufactured products and hence, in times of short supply, milk tends to be diverted from manufacturing channels into direct consumption wherever direct marketing is feasible.

Despite the prospective increases in the total fluid milk consumption, shortages may arise in certain markets, particularly during the fall and winter when production is seasonally low.

Supplies of ice cream and condensed and evaporated milk for civilian consumption probably will be 30 to 35 and 10 to 15 percent, respectively smaller than in 1942. Supplies of dried whole and spray-process dried skim milk for use in products for civilian consumption will be negligible in 1943 but supplies of roller-process dried skim milk may be almost as large as in 1942.

Poultry Products

Eggs: Assuming that the goals for egg production (4,780 million dozens) are fully realized in 1943, egg output will increase about 9 percent over the record production in 1942 and 25 percent over 1941. However, if present estimates of war requirements for eggs (25 to 30 percent of the output for lend-lease and military, mainly in dried form) are fully met, the civilian supply would be about 306 eggs per person compared with 317 eggs last year. With a strong over-all demand for food and a demand for eggs as a substitute for other foods, civilian supplies of eggs in 1943 probably will be short of the demand at the prevailing ceiling prices.

Chickens and Turkeys: The production of chickens in 1943 may exceed the 1942 record production of over 3 billion pounds by 25 to 30 percent. The production of turkeys probably will exceed the 1942 production by 10 to 15 percent. Military and lend-lease requirements may be about 5 percent of the total production. The 1943 civilian per capita supply of chickens and turkeys combined is estimated at about 33 pounds compared with about 26 pounds in 1942 and an average of about 21 pounds in 1935-39.

Increases in poultry production this year probably will not be fully reflected in normal marketing channels since relatively larger quantities will be consumed near surplus sections. This apparently developed to some extent last year, especially in turkey marketing.

The cents-per-pound ceilings on poultry recently announced by the Office of Price Administration will encourage large production. But with a very strong consumer demand for all meats, supplies of poultry at ceiling prices may be inadequate to fully meet the demand.

Fats and Oils

Production of edible fats and oils (excluding butter) in 1943 is estimated to be about 6.4 billion pounds or about 25 percent over the production in 1942. Military and lend-lease requirements are estimated at 1.6 billion pounds and civilian per capita consumption under the manufacturers' limitation order at 36.3 pounds. This estimate of the civilian per capita supply is 9 percent above 1942. The quantity of fats that consumers would take at ceiling prices is estimated to be somewhat larger than the quantity available, and shortages in butter may further increase this demand.

Of edible fats and oils as a group, the greatest increase in the civilian per capita supply under the manufacturers' limitation order will come from margarine. A 12 percent increase is also expected in lard. The civilian per capita supply of vegetable compounds and other food fats and oils is expected to be about the same as last year.

Fresh and Canned Fruits

Assuming favorable growing conditions, the production of fresh fruits (other than citrus) may be as large in 1943-44 as in 1942-43. The production of citrus fruits may be slightly higher. Tin restrictions will greatly curtail the 1943-44 pack of canned fruits and juices but the production of dried fruits may exceed last year's by about 10 percent.

The per capita civilian supply of fresh fruits (other than citrus) may be about the same as in 1942-43 but the per capita civilian supply of fresh citrus fruits may be somewhat smaller than the previous season's record consumption. Of the total 1943-44 pack of canned fruits and juices, between 55 and 60 percent will go to the military forces and lend-lease, and the per capita supply of canned fruits and juices for civilian consumption may be from 45 to 50 percent below 1942-43. The civilian demand for canned fruits and juices at the prevailing ceiling prices is much larger than the supply, and rationing of the restricted supply has become necessary. A rationing program for canned fruits and vegetables has already been announced by the Secretary of Agriculture and will be inaugurated by the Office of Price Administration in the early part of 1943.

Vegetables

Shortages of labor, materials, transportation facilities, and possible reduced yields in 1943 are likely to result in a crop about the same or somewhat smaller than the record 1942 production of commercially-grown fresh vegetables. In an effort to encourage production of the more essential fresh vegetables, the Secretary recently announced that the Department would pay $50 an acre for each acre of approved truck crops in excess of 90 percent and up to 110 percent of the truck crop goal. Moreover, an expected increase in the number of home-grown gardens may expand the supply for civilian consumption. Because of increased lend-lease and military demands, the per capita supply available for civilian consumption of commercially-grown fresh vegetables may decline about 15 percent below last year.

Tin restrictions and normal yields may reduce the production of canned vegetables by at least 10 percent below last year's production while military and lend-lease requirements will take up to 50 percent or more of the total 1943-44 canned vegetable pack. The supply of canned vegetables for civilian consumption probably will be from 30 to 40 percent below 1942-43. The 1943 production goals for potatoes, assuming average yields, will result in a crop of over 400 million bushels or an increase of about 10 percent over 1942. Along with the increased goal for potatoes, the Department of Agriculture pointed out that potato prices would be supported at 90 percent of parity, and announced a new program which offers growers a payment of 50 cents per bushel on the normal yield of the acreage planted in excess of 90 percent and up to 110 percent of the individual farm goal. If these goals are realized the per capita supply of potatoes for civilian consumption will be larger than it was in 1942. Recently announced goals call for a million acres of sweetpotatoes in 1943. If achieved, this acreage goal may result in a crop of over 80 million bushels, 22 percent larger than in 1942. As in the case of potatoes, growers are offered an incentive payment of 50 cents per bushel on the normal yield of acreage over 90 percent and up to 110 percent of the acreage goal. Attainment of the 1943 goals for dry edible beans may result in an increase of about 30 percent over the record production in 1942. An incentive payment of $20 per acre on acreage in excess of 90 percent and up to 110 percent of the individual farm goal has been offered in an effort to encourage increased plantings. However, war requirements for dry edible beans may amount to about one-third of the 1943 dry bean crop. Assuming a slightly smaller carry-over from the 1943-44 marketing season, the per capita supply for civilian consumption may be about the same as in 1942.

Wheat, Rye, and Rice

Supplies of food grains in 1943, with the possible exception of rice, are expected to be ample to meet all requirements now in prospect. A total wheat disappearance in 1943 of between 750 and 800 million bushels now appears probable. A disappearance of this size, however, may be satisfied largely from the 1943 crop in prospect, in which case stocks on December 31, 1943 would be only moderately below the record of December 31, 1942, estimated at 1,160 million bushels. On the basis of a winter wheat production indicated at 625 million bushels and an allowance for average yields on a slightly reduced spring wheat acreage, the total wheat crop may approximate 850 million bushels. This is considerably above the expected production on the goal acreage and is mainly a result of very favorable growing conditions for winter wheat. The estimated seeded acreage is actually below the acreage goal. Total rye disappearance in 1943 is expected to be about 45 million bushels. With favorable soil moisture conditions, it is probable that the 1943 crop will be sufficient to take care of all requirements. With the likelihood of some imports, stocks of rye at the end of 1943 may exceed the January 1, 1943 record, estimated at 66 million bushels. As a result of heavy domestic and foreign demands, a large rice disappearance is in prospect for 1943. In order to provide for the war needs and the needs of our island territories and possessions until the 1943 harvest, the Secretary of Agriculture on January 22 directed rice millers to set aside 60 percent of their stocks of milled rice on hand and 60 percent of quantities that may be milled for purchase by the Government. This would leave 40 percent for civilian consumption and regular exports. Expected increases in acreage and fairly dependable yields may result in a crop which will be sufficient to meet about all requirements during the latter part of 1943 and leave stocks on December 31, 1943 ample to take care of domestic and foreign needs until the 1944 harvest. As a result of the many requirements, civilian rice consumption in the United States for the calendar year 1943 may be reduced to 5.4 pounds per capita compared with the 1935-39 average of 5.8 pounds.

Corn, Oats, and Barley

The large production in 1942 of corn, oats, and barley appears to be enough to meet increased requirements of livestock, other domestic uses, and lend-lease shipments in 1942-43. The stocks of these grains carried over into the 1943-44 season may be about the same as in 1942-43.

Supplies of feed grains, hay, and high-protein feeds are the largest in several years in relation to the number of livestock to be fed. A record disappearance of feed is in prospect for 1943. Stocks of feed grains on hand at the close of the 1943 calendar year will depend to a considerable extent on 1943 production. Unless yield per acre is exceptionally high again this year, stocks of feed grains next January 1 probably will be somewhat smaller than on January 1, 1943.

Sugar

Since we produce domestically only about one-third of our normal sugar requirements and less than one-half of our needs under rationing, supplies of sugar depend largely on the amounts shipped in from off shore areas. To date no arrangements have been made for ships to be sent to off shore areas for the specific purpose of bringing sugar into the United States, and, therefore, receipts will depend entirely on back-hauling from areas to which essential goods are being shipped.

Civilian consumption under rationing in 1942 will average about 62.2 pounds per capita, which is about 35 percent below the 1935-39 average and 30 percent below 1941.

Military and lend-lease requirements are expected to take 45 to 50 percent of our domestic production, 10 to 15 percent of probably supply for 1943.

Coffee

The war shipping situation has resulted in the diversion of coffee shipments to other than normal ports of entry, a reduction in the volume of coffee shipments, and an increase in the costs of importing coffee.

After Pearl Harbor, wholesale coffee prices were frozen to prevent the price increases which were occurring as a result of curtailed supplies and heavy consumer demand. Importation costs, however, continued to rise. The wholesale coffee price order was amended to permit the addition of these increased costs to wholesale ceiling prices. Retail coffee prices were frozen at March levels by the General Maximum Price Regulation. After March, importation costs still continued to rise, resulting in automatic increases in wholesale ceiling prices. This in turn exerted pressure on the fixed retail ceilings. On July 2, 1942 the Commodity Credit Corporation started subsidizing the increases in importation costs and domestic transportation costs occurring after December 8, 1941. In August 1942 the War Shipping Administration relieved the Commodity Credit Corporation of a portion of the increased cost of war risk insurance.

Rationing was introduced in the latter part of 1942 to restrict civilian consumption of coffee to the level of civilian imports anticipated in 1943. The restricted level of consumption is only slightly below the average level of the 1930's. In general, rationing will not work hardships on consumers. That proportion of the population which uses coffee ordinarily consumes more than the rationed amount. However, all potential consumers receive the same quantity under the present rationing system and it is likely that proportion of the coffee allotted to nonusers is being transferred to the users.

Price control has retarded the increase in coffee prices but, in turn, necessitated subsidy payments of about 1.7 cents per pound for roasted coffee. Subsidies are also being paid to cover 75 percent of the increased domestic transportation costs arising from the diversion of coffee to other than normal ports of entry. This subsidy, in addition to removing pressure on retail ceilings, has aided in maintaining coffee blends and in distributing the limited supplies more uniformly.

Distribution of food supplies, average 1935-39, 1941, 1942, and estimated 1943, calendar years [1]

Commodity and year	Total supply [2]	Stocks end of year [3]	Total disappearance [4]	Apparent civilian consumption per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
Meats (dressed weight)				
Beef				
1935-39	7,250	99	7,151	55.1
1941	8,510	135	8,375	60.5
1942	9,145	129	9,016	60.7
1943	9,909	135	9,774	58.8
Veal				
1935-39	1,037	---	1,037	8.0
1941	1,029	---	1,029	7.9
1942	1,110	---	1,110	7.7
1943	1,130	---	1,130	6.8
Lamb and mutton				
1935-39	876	5	871	6.7
1941	930	8	922	7.0
1942	1,068	35	1,033	7.5
1943	1,025	5	1,020	6.7
Pork (excluding lard)				
1935-39	7,887	458	7,429	56.5
1941	10,119	469	9,650	66.6
1942	11,329	488	10,841	64.7
1943	14,288	600	13,688	66.0
All meats				
1935-39	17,050	562	16,488	126.3
1941	20,588	612	19,976	142.0
1942	22,652	652	22,000	140.6
1943	26,352	740	25,612	138.3
Fish				
Fresh and frozen [5]				
1941	1,323	108	1,215	9.0
1942	1,253	98	1,155	8.1
1943	1,138	80	1,058	7.3
Canned				
1941	1,235	300	935	5.4
1942	936	176	760	3.0
1943	805	151	654	1.8

Continued -

Distribution of food supplies, average 1935-39, 1941, 1942, and estimated 1943, calendar years 1/ - Continued

Commodity and year	Total supply 2/	Stocks end of year 3/	Total disappearance 4/	Apparent civilian consumption per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
Poultry Products				
Eggs				
1935-39	5,152	117	5,035	37.5
1941	5,878	187	5,691	39.3
1942	6,819	448	6,371	39.6
1943	7,626	562	7,064	38.2
Chickens (dressed weight)				
1935-39	2,521	109	2,412	18.7
1941	2,863	161	2,702	20.2
1942	3,280	149	3,131	22.8
1943	4,150	160	3,990	29.4
Turkeys (dressed weight)				
1935-39	373	29	344	2.7
1941	535	50	485	3.6
1942	535	36	499	3.6
1943	596	36	560	4.1
Dairy Products 2/				
Total milk for human consumption				
1935-39	107,376	3,009	104,367	806.4
1941	118,207	5,596	112,611	813.9
1942	125,466	3,920	121,381	851.8
1943	122,330	4,938	117,392	773.2
Butter, farm and factory				
1935-39	2,243	66	2,177	16.8
1941	2.309	114	2,195	16.0
1942	2,293	25	2,268	16.0
1943	2,145	95	2,050	12.8
All cheese, (except cottage, pot, and bakers')				
1935-39	833	109	724	5.6
1941	1,104	202	902	6.1
1942	1,345	132	1,213	6.4
1943	1,127	150	977	4.8
Condensed and evaporated milk				
1935-39	2,409	188	2,221	16.8
1941	3,767	412	3,355	19.0
1942	4,223	870	3,353	19.4
1943	4,325	585	3,740	16.1

Continued -

Distribution of food supplies, average 1935-39, 1941, 1942, and estimated 1943, calendar years 1/ - Continued

Commodity and year	Total supply 2/	Stocks end of year 3/	Total disappearance 4/	Apparent civilian consumption per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
Dairy Products - Continued				
Ice cream				
1935-39	1,232	---	1,232	9.6
1941	1,786	---	1,786	13.3
1942	2,045	---	2,045	15.1
1943	1,500	---	1,500	10.0
Dried whole milk				
1935-39	24	3	21	.13
1941	52	6	46	.18
1942	66	7	59	.12
1943	107	12	95	0
Malted milk				
1935-39	18	---	18	.11
1941	23	---	23	.13
1942	25	---	25	.15
1943	25	---	25	.15
Fluid milk and cream				
1935-39	44,245	101	44,144	342.3
1941	46,995	228	46,767	353.9
1942	50,228	105	50,123	380.1
1943	53,105	60	52,045	408.3
Dried skim milk				
1935-39	267	17	250	1.9
1941	392	21	371	2.5
1942	583	115	468	2.2
1943	765	200	565	1.6
Fats and Oils (excluding butter)				
Lard 6/				
1935-39	1,715	104	1,611	11.0
1941	2,508	187	2,321	14.3
1942	2,617	91	2,526	13.9
1943	3,021	104	2,917	15.5
Compounds and vegetable cooking fats (fat content)				
1935-39	1,590	49	1,541	11.9
1941	1,475	53	1,422	10.5
1942	1,383	40	1,303	8.7
1943	1,791	40	1,751	8.8

Continued -

Distribution of food supplies, average 1935-39, 1941, 1942, and estimated 1943, calendar years 1/ - Continued

Commodity and year	Total supply 2/	Stocks end of year 3/	Total disappearance 4/	Apparent civilian consumption per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
Fats and oils - Continued				
Margarine (actual weight)				
1935-39	385	5	380	2.9
1941	379	5	374	2.8
1942	7/	7/	430	3.0
1943	7/	7/	670	4.6
Other food products and uses (fat content)				
1935-39	7/	7/	882	6.3
1941	7/	7/	1,162	8.4
1942	7/	7/	1,040	7.7
1943	7/	7/	1,023	7.4
Total				
1935-39	7/	7/	4,414	32.1
1941	7/	7/	5,279	36.1
1942	7/	7/	5,299	33.3
1943	7/	7/	6,361	36.3
Fruits 8/				
Fresh fruits (excluding melons)				
Citrus				
1935-39	6,792	---	6,792	48.3
1941	8,224	---	8,224	57.2
1942	9,364	---	9,364	67.8
1943	9,520	---	9,520	66.4
Apples				
1935-39	6,198	---	6,198	43.0
1941	5,339	---	5,339	39.1
1942	5,043	---	5,043	36.8
1943	5,975	---	5,975	37.8
Other fresh 9/				
1935-39	8,005	---	8,005	60.1
1941	7,874	---	7,874	58.6
1942	5,975	---	5,975	45.2
1943	5,932	---	5,932	45.2
Canned fruits 10/				
1935-39	2,441	210	2,231	14.9
1941	2,923	122	2,801	19.0
1942	3,572	868	2,704	14.7
1943	3,070	837	2,233	6.8
Canned fruit juices 11/				
1935-39	957	---	957	7.3
1941	938	3	935	6.7
1942	1,578	369	1,209	7.8
1943	1,494	378	1,116	5.9

Continued -

Distribution of food supplies, average 1935-39, 1941, 1942
and estimated 1943, calendar years 1/ - Continued

Commodity and year	Total supply 2/	Stocks end of year 3/	Total disappearance 4/	Apparent civilian consumption per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
Fruits - Continued				
Frozen fruits 12/				
1935-39	529	---	529	.8
1941	257	---	257	1.3
1942	311	---	311	1.6
1943	278	---	278	1.6
Dried fruits 13/				
1935-39	1,417	279	1,138	7.9
1941	1,267	146	1,121	6.0
1942	1,251	122	1,129	5.3
1943	1,358	122	1,236	5.0
Fresh vegetables 14/	1,000 tons	1,000 tons	1,000 tons	Lb.
Leafy, green, and yellow 15/				
1941	4,173	---	4,173	78.6
1942	4,612	---	4,612	83.5
1943	4,334	---	4,334	69.6
Tomatoes				
1941	1,331	---	1,331	25.7
1942	1,427	---	1,427	26.5
1943	1,449	---	1,449	25.8
Melons 16/				
1941	1,978	---	1,978	38.5
1942	1,834	---	1,834	34.0
1943	1,601	---	1,601	27.6
Other vegetables 17/				
1941	3,483	---	3,483	63.6
1942	3,716	---	3,716	65.1
1943	3,495	---	3,495	57.2
Canned vegetables 18/	1,000 cases 24 No. 2's	1,000 cases 24 No. 2's	1,000 cases 24 No. 2's	Lb.
1941	207,235	---	207,235	42.0
1942	220,688	---	220,688	37.0
1943	202,600	---	202,600	23.9
	1,000 bu.	1,000 bu.	1,000 bu.	Lb.
Potatoes 19/				
1935-39	357,872	---	357,872	133.2
1941	356,194	---	356,194	124.6
1942	371,850	----	371,850	124.0
1943	401,000	---	401,000	129.2

Continued -

Distribution of food supplies, average 1935-39, 1941, 1942, and estimated 1943, calendar years 1/ - Continued

Commodity and year	Total supply 2/	Stocks end of year 3/	Total disappearance 4/	Apparent civilian consumption per capita
	1,000 bu.	1,000 bu.	1,000 bu.	Lb.
Sweetpotatoes 20/				
1935-39	68,467	---	68,467	23.8
1941	62,144	---	62,144	21.0
1942	65,380	---	65,380	21.4
1943	82,000	---	82,000	26.9
	1,000 100 lb. bags	1,000 100 lb. bags	1,000 100 lb. bags	Lb.
Beans, dry edible (cleaned basis) 20/				
1935-39	15,199	2,219	12,980	8.8
1941	19,822	4,500	15,322	8.0
1942	23,114	4,600	18,514	7.3
1943	25,675	5,000	20,675	7.3
	1,000 short tons	1,000 short tons	1,000 short tons	Lb.
Sugar 21/				
1935-39	9,491	2,695	6,796	97.2
1941	11,212	3,657	7,555	105.1
1942	9,229	2,500	6,729	87.3
1943	7,950	2,500	7,200	62.2
Grains	Mil. bu.	Mil. bu.	Mil. bu.	Lb.
Wheat				
1935-39	1,257	519	738	222.4
1941	1,673	1,001	672	223.8
1942	1,983	1,160	823	219.6
1943	2,012	1,035	977	231.6
Rye				
1935-39	76	29	47	3.9
1941	96	54	42	3.8
1942	111	66	45	3.9
1943	133	88	45	3.9
Rice 22/				
1935-39	86	34	52	5.8
1941	89	33	56	5.7
1942	99	38	61	6.2
1943	105	38	67	5.4
Corn				
1935-39	3,698	1,574	2,124	54.0
1941	4,710	2,182	2,528	61.0
1942	5,358	2,346	3,012	72.0
1943	5,200	2,000	3,200	71.4

Continued -

Distribution of food supplies, average 1935-39, 1941, 1942, and estimated 1943, calendar years 1/ - Continued

Commodity and year	Total supply 2/	Stocks end of year 3/	Total disappearance 4/	Apparent civilian consumption per capita
	Mil. bu.	Mil. bu.	Mil. bu.	Lb.
Grains - continued				
Oats				
1935-39	1,661	675	986	6.9
1941	1,989	761	1,228	7.1
1942	2,126	897	1,229	7.8
1943	2,075	750	1,325	8.0
Barley 23/				
1935-39	362	198	164	21.7
1941	559	210	349	22.6
1942	675	290	385	27.2
1943	707	250	457	27.0
	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
Coffee 24/				
1935-39	1,933	105	1,828	14.0
1941	2,736	543	2,193	16.1
1942	2,140	150	1,990	13.5
1943	1,950	350	1,600	9.6
Tea 24/				
1935-39	128	40	88	.7
1941	158	49	109	.8
1942	115	20	95	.7
1943	85	32	53	.2
Cocoa 24/				
1935-39	719	131	588	4.4
1941	1,248	575	673	4.8
1942	775	225	550	3.9
1943	605	125	480	3.2

1/ 1942 figures are preliminary.

2/ Production, imports, and stocks at the beginning of the year. 1943 estimated production is based on average yields and the production programs and goals set by the Department of Agriculture. Goals are not assumed in the case of wheat and dairy products. The assumed production is larger than the goal for wheat and somewhat smaller than the goal for dairy. If the goal for total milk (122 billion pounds) is realized, the civilian for capita supply of butter might be 14 pounds, cheese 5 pounds, and total dairy products (milk equivalent) 805 pounds.

3/ Stocks at the end of the year for 1942 and 1943 include commercial stocks and Government holdings.

4/ Exports (including lend-lease), shipments, supply for domestic consumption (including military) and other uses.

5/ Statistics on fish for 1935-39 which are comparable to 1941 and 1942 are not available. The Bureau of Fish and Wildlife, Department of Interior estimates the average per capita consumption for that period at 13.3 pounds.

5/ Excludes lard used in shortening, margarine, etc.

Distribution of food supplies, average 1935-39, 1941, 1942, and estimated 1943, calendar years 1/ - Continued

7/ Statistics on stocks are not available.
8/ Fruits are calculated on a fiscal year basis, and civilian consumption is based on population on January 1 following the beginning of the period. Stocks on fresh fruits are not available.
9/ Includes apricots, avocados, bananas, cherries, cranberries, figs, grapes, olive olives, peaches, pears, pineapples, plums and prunes, and strawberries.
10/ Includes citrus, apples, apricots, berries, cherries (sweet), cherries RSP, cranberry sauce, figs, fruit cocktail, fruits for salad, grapes (in 1941-42), olives peaches, pears, pineapples, plums, and prunes.
11/ Excludes concentrated juices. Includes grapefruit, orange, lemon, mixed citrus, grape (except wine) pineapple, prune, and nectar juices. Data on apple juice is not available.
12/ Principally cherries, strawberries, and other berries.
13/ Includes dried apples, apricots, peaches, pears, prunes, raisins, dates, and figs.
14/ Includes market garden production. Civilian consumption is based on urban population, since farm garden production is not available. Comparable figures for 1935-39 and stocks not available.
15/ Includes asparagus, snap beans, cabbage, carrots, lettuce, green peas, and spinach.
16/ Cantaloups and watermelons.
17/ Includes artichokes, lima beans, beets, cauliflower, celery, sweet corn, cucumbers, eggplant, garlic, kale, onions, green peppers, and shallots. Comparable figures for 1935-39 and for stocks are not available.
18/ Includes asparagus, snap beans, carrots, green peas, spinach, bulk kraut, tomatoes (whole, paste, pulp and puree, sauce, juice, and catsup), lima beans, beets, corn, pimientos, pumpkin and squash, vegetable puree (baby food), hominy, sweetpotatoes, potatoes, other minor packs, and pickles in bulk, In 1941-42, "other" includes a long list of minor vegetables most of which were not packed in 1942-43 and 1943-44. Calculated on a fiscal year basis. Stocks not available.
19/ Fiscal year basis. Revised data for 1935-39, 1941, 1942.
20/ Crop year basis.
21/ Raw basis, except for civilian per capita consumption, which is on a refined basis.
22/ Civilian per capita on milled basis.
23/ Per capita consumption includes malt liquors, malt extracts, and other food products.
24/ Basic data supplied by War Production Board, Office for Agricultural War Relations, and Department of Commerce.

PROSPECTS FOR FOODS IN THE FIRST QUARTER OF 1943

With supplies of meats, canned goods, and some dairy products lower than a year ago, although cereals and fats are in larger supply, the per capita supply of food for civilian consumption in the first quarter of 1943 is expected to be lower than it was in the same period last year. The demand for foods at the prevailing ceilings will be large and will exceed the supply of some food commodities.

Meats: Although total meat production in the first quarter of 1943 is expected to be larger than in the same period last year, this increase will be more than offset by large war demands. The meat limitation order effective during the first quarter of 1943 will limit commercial supplies of meats to about 70 percent of the supply available for civilians in the same period in 1941.

Poultry Products: Egg production in the first quarter of 1943 will increase seasonally and at a higher level compared with a year earlier. Current consumption of eggs is exceptionally high and if the present rate of consumption were continued would result in a per capita consumption of nearly 45 pounds or 360 eggs for the year as a whole. However, to meet requirements for lend-lease, our military forces, and hatching in the next few months civilian consumption probably will run below the level of a year earlier. Production of young chickens in this period will be by far the largest on record. Storage stocks are much larger than average. Storage holdings of fowl (mature hens) and heavy young chickens are of near-record size. Supplies of fresh young chickens in the next few months will come primarily from specialized producing sections of the country. Supplies of fresh young turkeys will be small until next fall. Storage supplies of young turkeys, however, are larger than average.

Dairy Products: Major shortages of dairy products in the first quarter of 1943 will be in butter and ice cream. Butter supplies available for civilian consumption may be about 30 percent smaller than in the corresponding period last year and civilian ice cream production may be about 25 percent smaller. Civilian consumption of fluid milk and cream may be almost 15 percent larger than in the first quarter of 1941 and consumption of other manufactured dairy products may be about the same as a year earlier. Commercial stocks of the latter products are large enough to make up for the prospective decrease in production but will be largely used up by the end of the period. However, even though supplies available for civilian consumption of these products are as large as a year earlier they may be substantially smaller than consumers would like to purchase at ceiling prices. This probably will be true for both cheese and evaporated milk.

Fats and Oils: The production of total fats and oils (excluding butter) in the first quarter of 1943 is likely to be 20 percent over the same period in 1942. War requirements are expected to amount to about one-fifth of this production, but the per capita supply for civilians is expected to be somewhat larger than in the same period last year.

Fruits: The supply of fresh fruits for civilian consumption during the first quarter of 1943 is expected to be about the same as a year earlier. Cold-storage supplies of apples as of January 1 were one-fifth larger than a year earlier. The supply of canned fruits and juices for civilians may be considerably lower than in the same quarter of 1942.

Vegetables: The total supply of fresh vegetables in the first quarter of 1943 available for civilian consumption is expected to be about 10 percent lower than in the same period last year. Because of the rapid movement of potatoes into consumption channels, it is quite likely that potato stocks for use in the first quarter will be smaller than last year. However, the commercial early potato crop in South Florida and Texas is 19 percent above 1942 and indicated acreage in North Florida and the Lower Valley of Texas is 15 to 20 percent above last year. Inasmuch as early potato production is small compared with the total potato crop, the larger early potato crop may not materially change the supply picture for the first quarter. Supplies of canned vegetables for civilian use probably will be considerably lower than for the same period last year.

Rationing of canned fruits and vegetables is scheduled to begin in the first quarter of 1943.

THE NEW DEPARTMENT OF AGRICULTURE

On December 5, 1942 President Roosevelt placed direction of food production and distribution under Secretary of Agriculture, Claude R. Wickard.

Under the President's order, the Secretary will assume responsibility for and control over the Nation's food program. He is empowered to formulate and carry out a program designed to furnish a supply of food adequate to meet the military, civilian, lend-lease, and other foreign requirements, both for human and animal consumption and for industrial uses. In this order Secretary Wickard was made responsible for all policies and programs relating to rationing of the civilian food supply, but the actual administration of any rationing will be done by the Office of Price Administration.

The Foods Requirements Committee of the War Production Board which was established June 4, 1942 was abolished by this order, and replaced by a Food Advisory Committee appointed by the Secretary of Agriculture.

In line with the Executive Order of the President, Secretary Wickard regrouped the Department of Agriculture into three major administrative units; The Food Production Administration, the Food Distribution Administration, and the Agriculture Research Administration. The first two are new agencies established under this order.

RETAIL PRICE CEILINGS PLACED ON FOODS DURING 1942

The Emergency Price Control Act of 1942, approved January 30 and amended October 2, gives the Price Administrator authority to establish maximum prices for commodities that "have risen or threaten to rise" to a degree inconsistent with the purposes of the act.

A 60-day ceiling was placed on canned fruits and vegetables, effective March 2, based on the highest prices received during the period February 23-27, 1942. (Tempo. MPR 6)

On May 18 at retail, the prices of all processed food products not already controlled were placed under ceilings at the highest prices received during March 1942, with the following exceptions: eggs, poultry, all milk products (other than bottled fluid milk and cream sold at retail and ice cream), flour, mutton and lamb, and dried prunes. Fresh milk and cream, ice cream, and cake and flour mixes were included. Bananas were the only raw and unprocessed food product covered. (GMPR) Lamb ceilings were fixed at the highest price received during July 27-31, 1942, effective August 10. (Tempo. MPR 20, superseded by MPR 239)

On October 5 prices of the following foods, not included under the General Maximum Price Regulation, were placed under a 60-day ceiling at the highest prices received during the period September 28-October 2, 1942: milk products (butter; cheese; evaporated, condensed and dried milk; casein, malted milk powder), eggs (all forms), poultry (all forms), mutton, white potatoes, citrus fruits (all forms), flour, onions, dry edible beans, dried peas and lentils, and cake and flour mixes, corn meal, hominy and hominy grits (in bulk or packages of more than 3 pounds). Subsequently, all these foods have been included under permanent regulations, for a few of which the ceilings have been changed. (MPR 238, MPR 239, MPR 268, MPR 280, and MPR 289)

Retailers were given a choice, on October 15, between the March 1942 level and a fixed margin over net cost for the following items: breakfast cereals, coffee, canned fish, cooking and salad oils, rice, hydrogenated and other shortening, cane and beet sugar, and canned vegetables. The fixed margin was made mandatory on dried fruits and lard effective October 15, and on dry edible beans November 12. (MPR 238)

On October 26 ceilings were fixed on a number of seasonal commodities, which are not ordinarily sold at retail in March. The maximum price for these foods is net cost multiplied by the 1941 percentage mark-up. They are as follows: mincemeat; plum, fig and date puddings; Christmas cookies, fruit cake; holiday candy; chocolate-covered cherries, sweet apple cider, glaced or candied fruits and peels; stuffed dried fruits; dried figs; pure sorghum syrup; pitted and macerated dates and date products. Bottled eggnog and Tom and Jerry batter were added December 5. (MPR 250)

As of November 1 the maximum price for any domestic malt beverage, except in 32-ounce containers or on draught, is the highest price received during the period October 1-15, 1941, plus a permitted margin increase. Such a beverage on draught remains under the General Maximum Price Regulation. (MPR 259)

On November 9 a fixed margin over net cost was placed on potatoes, onions, and turkeys. (MPR 268)

On December 29 a 60-day ceiling was placed on shelled peanuts, salted peanuts, and peanut butter at the highest prices received for the period December 19-23. (Tempo. MPR 23)

Retail prices on the following foods have been raised slightly from the March 1942 level to relieve a squeeze: canned fruits, berries and juices; domestic distilled spirits; frozen fruits, berries and vegetables; preserves, jams and jellies; apple butter; canned shrimp; domestic canned crabmeat; canned apples, applesauce and apple juice; vinegar-cured herring; canned boned chicken and turkey; maple sugar and syrup; fountain fruits; egg noodles; tamales; tortillas; potato chips; raisin filled or topped biscuits and crackers; fig bars; peanut candy; and extracted honey. (MPR 193, MPR 197 and MPR 256)

In addition to the above orders, which applied directly to the retail level, two regulations at the wholesale level may be mentioned, since they probably had some effect on retail prices prior to the passing of the General Maximum Price Regulation. On February 3 a dollars-and-cents ceiling was placed on tea, and on March 23 a 60-day ceiling was placed on dressed hogs and wholesale pork cuts. (PS 91 and Tempo. MPR 8)

There is still no price control over the following foods: fresh fruits and vegetables (except citrus fruits, bananas, potatoes and onions), fresh fish and other fresh seafood, peanuts in the shell, and other nuts.

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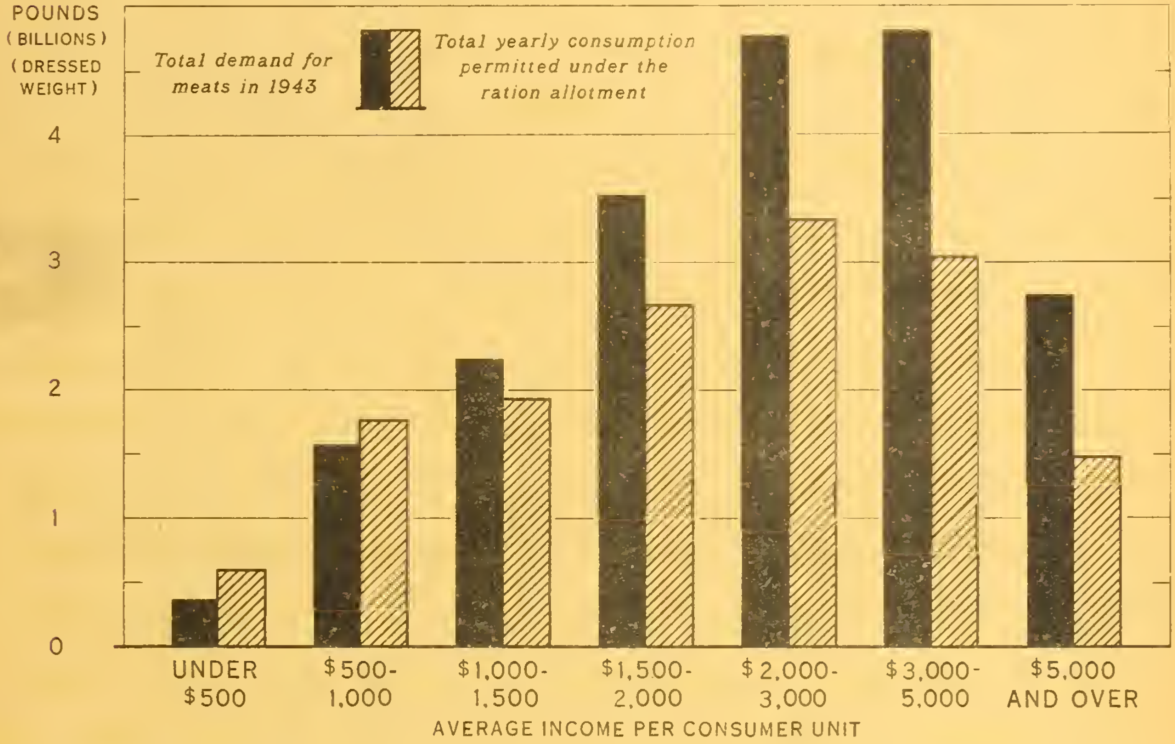
THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-4 BAE APRIL 1943

TOTAL DEMAND FOR MEATS IN 1943 COMPARED WITH A RATION ALLOTMENT OF 2 POUNDS PER PERSON PER WEEK, BY INCOME CLASSES



U. S. DEPARTMENT OF AGRICULTURE NEG. 42960 BUREAU OF AGRICULTURAL ECONOMICS

With present meat prices, the demand for meats in 1943 is expected to average about 70 pounds per capita (dressed weight) in the lowest income group and about 215 pounds per capita in the highest income group. With a record number of people in the higher income brackets it is estimated that the total demand for meat in 1943 will exceed the available supply by as much as 5 billion pounds. This discrepancy between the effective demand and the available supply makes rationing desirable in order to attain a more even distribution of the supply. A ration of 2 pounds per person per week will reduce the per capita consumption of meats to the 1935-39 level. While the people in the lower income groups will not have the means to purchase the full ration allotment of meat, the number in these groups is the lowest in our history. For the millions of people who have recently moved into the upper income groups, the ration allotment will be less than they would like to buy at present ceilings but more than they could afford previously.

THE NATIONAL FOOD SITUATION

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Summary

The annual March "Prospective Plantings" survey indicates nearly a 4 percent increase over 1942 in acreage of the major spring crops to be planted in 1943. The prospective planted acreage of food crops and food grains shows a 5 percent increase over 1942, feed grains and hay a 2 percent increase, and oil-bearing crops a 14 percent increase. The purpose of the Intentions to Plant Report is to give a preview rather than a forecast of the actual acreage to be planted this year. Changes in the acreage intended to be planted can and will be made before planting time if these changes appear desirable. This year, in particular, strenuous efforts are under way to induce farmers to increase acreage of various food crops such as peanuts, sugar plants, dry beans, and potatoes above the levels indicated by the Intentions Report. If this effort is successful, the food output of the year will increase above the March indications. However, assuming no changes in the prospective plantings, average weather, and the continuation of the present trend in livestock production, the production of food for human consumption in 1943 will be about 30 percent larger than the yearly average for 1935-39 and about 3 percent larger than the record production in 1942.

The biggest problem in exceeding or even attaining this volume of production, assuming favorable weather, is scarcity of farm labor and farm machinery. It is estimated that about 1 million actual or potential workers will have migrated from the farm population between July 1942 and July 1943, including those who entered the armed forces. This may mean the need for replacing a substantial number of adult male workers by women and children as well as a substitution of older men and inexperienced workers for the younger and more skilled. However, there are indications that some of the replacements may be made by experienced adult male workers who return to farm work as a result of the recent selective service regulation regarding the deferment of farm workers of military age and the measures taken to induce men over 38 engaged in less essential occupations to shift into essential jobs. The current farm employment estimates indicate that during the first quarter of this year the number of people employed on farms, including family labor as well as hired labor, was approximately the same as in the corresponding period a year ago, suggesting that such replacements have so far taken place. Steps taken by the Department of Agriculture and the War Manpower Commission regarding deferment of farm workers, importing farm workers from Mexico and the Bahamas, movement of farm families from less productive areas into more productive areas, and recruitment and training of urban labor for farm work are expected to alleviate the tight labor situation in 1943. But the scarcity of experienced able-bodied farm laborers will remain an important factor in the total food production this year.

The amount of new farm machinery to be made available to farmers in 1943 will be only about 40 percent of the quantity purchased by farmers in 1940. This decrease will be compensated for to some extent by an increase in the quantity of repair parts available--67 percent more than were sold in 1940. While the number of machines on farms at the beginning of 1943 was the largest on record, their average age is greater than in previous years. Moreover, owing to scarcity of labor and relatively high farm wages, the demand for labor-saving machines will greatly exceed the available supply. Shortages of machinery are especially acute in those areas where rapid expansion in certain crops, such as peanuts and soybeans, has taken place in the last few years.

Although food production in 1943, assuming average yields, is expected to be somewhat larger than the record food production in 1942, the Government has instituted rationing this year of processed fruits and vegetables, meats, canned fish, edible fats and oils (including butter), and cheese. Rationing of these commodities became necessary partly because of the large military and lend-lease requirements but mainly because of increased civilian demand.

Military and lend-lease uses will be allotted 20 to 25 percent of the prospective 1943 food production. Civilians will be allotted from 75 to 80 percent of the total output. The total share of the production allotted to civilians is approximately equal to the average yearly production for the period 1935-39. The civilian per capita supply of food will also be reduced to about the 1935-39 level.

As a result of increases in our military forces, the civilian population in 1943 will be more than a million smaller than the average civilian population in the period 1935-39, and the proportion of adult civilian consumers in 1943 will be smaller than in 1935-39. However, with more people now able to purchase the foods which formerly were beyond their means, the demand for foods has more than compensated for the difference in the civilian population in these two periods. For example, if the consumption of meats in 1935-39 had been evenly distributed, the share per person would have been 126 pounds (dressed weight). However, in actual fact, a large section of the population was financially unable to purchase that much meat. On the other hand, many people in the upper income brackets consumed as much as 200 pounds per capita.

In 1943, the millions of people who have moved into the upper income groups find themselves for the first time in a financial position to purchase at the prevailing ceiling prices, the quantity and quality of meat that they always desired. The demand for meat has, therefore, increased tremendously over 1935-39. Present estimates indicate that the average civilian demand for meat in 1943 will be as high as 160 pounds per capita. Since the civilian per capit supply of meats for the year as a whole is expected to differ little from the 126 pounds per capita consumption in 1935-39, rationing of meats became essential to the maintenance of price ceilings and more even distribution of the available supply. Again, the average per capita consumption of all food fats and oils (including butter) in the average year from 1935 to 1939 was about 48 pounds. The estimate of demand for 1943 based on ceiling prices and expected income is about 55 pounds per capita. The per capita civilian supply of fats and oils (including butter) for the year as a whole is expected to be about 46 pounds. Similarly the per capita consumption of all dairy products (milk equivalent) in 1935-39 was about 806 pounds. The demand in 1943 is estimated at about 855 pounds and the supply available for civilians will be close to 770 pounds.

The estimates of demand for a given commodity are based on normal relationships between consumption, price and income, and they do not take into consideration probable shortages in substitute commodities which further increase the gap between the effective demand and available supply. For example, because of relatively high ceiling prices and because, normally, cheese consumption is not an important factor in the American diet, the estimated demand for cheese in 1943 is only about 7 pounds per capita. However, this estimate assumes that the supply of substitute foods will be adequate. But with the expected shortages in meat, the demand for cheese may be as high as 10 pounds per capita. The amount of cheese that will be available for civilians in

1943 is 5.7 pounds per capita. Similarly, the civilian demand for chickens in 1943 is estimated at about 26 pounds per capita (dressed weight). Because of the increased production the civilian per capita supply is expected to be about 28 pounds per capita. However, considering the shortages in meats and other protein foods the demand for chickens probably will exceed even this record supply.

In short, assuming only average weather and a rather conservative view of the prospective production, the civilian per capita supply of foods should be about as large as the average for 1935-39 and with rationing, may be more evenly distributed than during the pre-war period. While military and lend-lease requirements do account for a large portion of our total food supply, these requirements cannot be given as the main reason for rationing of foods. In 1935-39 rationing of foods was not considered necessary. With approximately the same supply of food per capita in 1943, however, rationing is necessary, because of the abnormally large divilian demand. With price ceilings placed on foods, but without rationing, distribution of the supply to consumers would be highly irregular and uneven. With a large demand, food stocks would be depleted before they could be replenished and consumption could not be maintained at a constant level throughout the year as no reserves could be built up during the season of high production. Furthermore, pressure on price ceilings would make price controls very difficult.

April 15, 1943

Table 1.- Volume of agricultural production for sale and for consumption in the farm home, and civilian per capita food consumption, 1940-43

Index numbers (1935-39 = 100) 1/

Production	1940	1941	1942 2/	1943 3/
Food grains	110	131	138	109
Truck crops	111	115	127	119
Fruits	110	114	114	117
Vegetables, excluding truck crops	101	102	105	108
Sugar crops	104	97	113	98
Total food crops	109	117	124	115
Meat animals	118	118	139	146
Poultry	109	115	128	153
Dairy products	105	110	116	115
Total food livestock	112	115	129	137
Total food production	111	115	128	131
Total agricultural production	110	113	127	128
Civilian per capita food consumption	105	111	109	103

1/ Index numbers for earlier years were given in the October 1942 National Food Situation. The quantities included in the index are weighted by the farm price in the base period and consequently percentage increases based on these index numbers may not correspond to increases based on unweighted total production.

2/ Tentative.

3/ Based on the March "Prospective Plantings" survey with assumption of average yields plus estimated marketings and home consumption of livestock and livestock products for the calendar year 1943.

PROSPECTIVE CIVILIAN FOOD SUPPLY IN 1943

The 1943 goals for meat production call for an increase of about 17 percent over last year. However, if the trend in marketings recorded in regular commercial channels in the first 3 months of this year continues, it appears that the increase in the commercial supply of meat anticipated under the goals may not be fully realized.

The number of hogs on farms on January 1 was the largest on record -- 22 percent larger than on January 1, 1942. Federally inspected slaughter of hogs in the first 3 months of the year did not reflect the expected increase in marketings after allowing for increases in breeding stock. Unless hog slaughter shows a marked increase in the remaining three quarters of the year, the total production of pork in 1943 may not be more than 15 percent larger than in 1942. The number of sows and gilts reported on farms as of January 1 was nearly 25 percent greater than a year earlier. This is an indication of plans for increasing the 1943 spring pig crop, but less than half of the pigs raised this spring will come to market this calendar year.

The number of cattle and calves other than milk animals on farms January 1 was nearly 6 percent larger than a year earlier. However, this increase does not necessarily imply a similar percentage increase in the production of beef and veal for the year. In the first 3 months of 1943 federall inspected slaughter of cattle and calves was about 10 percent less than in the same months last year. The drop in federally inspected slaughter may merely reflect late movement to feed lots, increases in local slaughter, and black market operations. With a tightened control of the meat supply through measures recently announced by the Department of A griculture and the Office of Price Administration, federally inspected slaughter of cattle and calves may show an increase in the remaining three quarters of the year. However, curren conditions seem to indicate that the total production of beef and veal for the year as a whole may fall short of the goal.

The number of sheep and lambs on farms on January 1 was about 3 percent smaller than a year earlier while the federally inspected slaughter for the first quarter of this year was about 1 percent larger than last year. The production of lamb and mutton for the year as a whole, however, is expected to be about 13 percent less than last year.

The total number of chickens on farms on January 1 was about 14 percent larger than the record number on the same date in 1942. This does not include commercial broilers. Production of broilers is expected to be much larger thi year than the record production in 1942, which was 19 percent larger than in 1941. Although production of chickens of all types in 1943 will exceed 1942 production, the increase will come mostly in the second half of the year and supplies will be seasonally small during the first 3 months of meat rationing.

The number of hens and pullets on farms on January 1 was about 14 percent above the record number on the same date in 1942. However, the increase in egg production may be larger than is indicated by the number of layers, as the production per hen in the first 3 months of the year exceeded last year's production in the same period. Total egg production in January was 11.5 percent greater than a year earlier and in February about 19 percent greater.

The number of cows and heifers being kept for milk on farms at the beginning of 1943 was about 2 percent larger than at the beginning of 1942 but the increase during 1942 was somewhat smaller than in the previous year. Total milk production in January and February was about 1 percent larger than a year earlier but the milk equivalent of dairy products manufactured was smaller, indicating a larger consumption of fluid milk. As a result of competition from hogs for feed and labor and difficulties experienced by farmers in obtaining feed supplies and labor, total production of milk in 1943 may fall below that of 1942.

The prospective 1943 wheat acreage indicates a 4 percent increase in planted acreage of spring wheat. Assuming average abandonment and a yield equal to that of the post-drought years 1937-41, a spring wheat production of about 170 million bushels is indicated. This amount, added to the 559 million bushels of winter wheat estimated in the April crop report points to a total wheat production of approximately 730 million bushels. This would be about 250 million bushels below last year but about the same as the 1932-41 average.

The prospective rice acreage is the same as in 1942. With average yield a production of about 73 million bushels would be obtained which is 11 percent over 1942 (as a result of lower than average yield in 1942), and 46 percent over the average for the period 1935-39.

The prospective 1943 acreage for corn, oats, and barley is 4 percent greater than the acreage planted in 1942. The combined production of the 3 major feed grains on the 1943 indicated acreage, however, may be about 11 percent smaller than in 1942 if yields are about average. The prospective planted acreage of oil-bearing crops is 14 percent larger than in 1942. On the basis of this acreage, the production of oilcake and meal in 1943-44 is expected to be larger than for the current season but the amount available for livestock feeding may be smaller as large quantities of soybean meal may be used for food.

Table 2.- Planted acreage of major crops, 1935-39 average, 1941, 1942, and prospective plantings for 1943, with percentage comparisons

Crops	1935-39	1941	1942	1943 1/	1943 as a percentage of 1935-39	1943 as a percentage of 1941	1943 as a percentage of 1942
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Percent	Percent	Percent
Corn, all	97,055	87,631	91,011	96,827	100	110	106
Spring wheat	21,659	16,661	14,194	14,707	68	88	104
Oats	40,586	41,598	42,662	42,638	105	103	100
Barley	13,364	15,797	19,448	19,306	144	122	99
Flaxseed	1,938	3,470	4,691	6,051	312	174	129
Rice	1,007	1,263	1,505	1,505	149	119	100
All sorghums	15,254	18,682	16,109	16,594	109	89	103
Potatoes	3,123	2,768	2,793	3,174	102	115	114
Sweetpotatoes	804	746	708	813	101	109	115
Tobacco 2/	1,647	1,308	1,380	1,402	85	107	102
Beans, dry edible	1,917	2,255	2,135	2,480	129	110	116
Soybeans 3/	7,262	10,146	14,222	15,603	215	154	110
Cowpeans 3/	3,165	3,778	3,407	2,974	94	79	87
Peanuts 3/	2,173	2,461	4,647	5,230	241	213	113
Tame hay 2/	55,770	59,317	60,211	60,270	108	102	100
Sugar beets	893	794	1,049	740	83	93	71

1/ Prospective plantings as of March 1, 1943.
2/ Acreage harvested.
3/ Grown alone for all purposes. Partly duplicated in hay acreage.

Table 3.- Livestock on farms January 1, 1935-39 average, 1941, 1942. 1943. with percentage comparisons

Item	1935-39 average	1941	1942	1943	1943 as a percentage of 1935-39	1943 as a percentage of 1941	1943 as a percentage of 1942
	1,000 head	1,000 head	1,000 head	1,000 head	Percent	Percent	Percent
Total cattle and calves	66,814	71,461	75,162	78,170	117	109	104
All milk cows 1/	24,999	25,478	26,398	26,946	108	106	102
Hogs	43,932	54,256	60,377	73,660	168	136	122
Sheep and lambs	51,344	54,283	56,735	55,089	107	101	97
Total chickens 2/	405,108	422,909	474,910	540,107	133	128	114
Hens and pullets	364,377	381,372	426,226	487,089	134	127	114
Turkeys	6,035	7,252	7,623	6,549	109	90	86

1/ Two years old and over, kept for milk.
2/ Does not include commercial broilers. Production of broilers is expected to be much larger in 1943 than in 1942. In 1942, the production of broilers was 204 million heads as compared with 172 million in 1941.

Meats

Formal rationing of meat to civilian consumers was begun on March 29. In addition to all fresh and cured cuts of beef, veal, pork, lamb, and mutton, the list of rationed meats includes such variety products as livers, hearts, sweetbreads, etc., and canned meats including fish, and sausage. The rationing program is being carried out on the basis of the point system, which allows different point values for the several cuts and kinds of meats according to their scarcity and the relative demand for them.

On the basis of the initial point values and other supply control features of the program, it is estimated that the average ration of meat for individual consumers will be in the neighborhood of 2 pounds per week (retail weight), which is equivalent to an annual per capita consumption on a dressed weight basis (excluding offal) of about 120 pounds. This is roughly 20 pounds per person less than the high rate of consumption reached in 1941 and 1942, but it is only a little less than the average for the 5 years 1935-39 when the meat supply was more unevenly distributed than it will be under rationing.

The total output of meats in 1943 will greatly exceed the 1935-39 average production — perhaps by as much as 50 percent. However, most of the increase over that period is being absorbed by the large war requirements of our armed forces and of our allies. An added reason for the reduction in the civilian meat ration in relation to the high average consumption of the preceding 2 years is that marketings of livestock for slaughter in regular commercial establishments currently are running below expectations based upon the production of live animals. This has been due in part at least to a larger than usual local slaughter and to black market operations. Action taken recently by the Department of Agriculture to license livestock slaughterers and dealers and by the Office of Price Administration to control black markets should help materially to improve this situation.

Farm production of meat animals and the supply of livestock for slaughter during 1943 is much the largest on record. The 1942 fall pig crop, now beginning to move to market, was 8 million head larger than the 1941 crop and 16 million head larger than the yearly average for 1931-40. This year's spring crop, which will be marketed during the coming fall and winter, also is expected to be substantially larger than the record 1942 spring crop of 61 million head. The cattle population has increased sharply since 1938, and the number of cattle and calves on farms and ranches at the beginning of this year -- 78 million head including milk animals — was 4 million greater than the previous peak number reached in 1934. Sheep numbers were slightly smaller on January 1, 1943 than a year earlier, but lamb and mutton ordinarily constitutes only about 5 percent of the total meat production in the United States.

Fish

On March 29 all fish, shellfish, and fish products in hermetically sealed containers became subject to rationing under the point system. In spite of the million cases of canned salmon recently released for civilian consumption, supplies of canned fish from the 1942 production will be considerably below quantities available in previous years. Items which will be in more nearly normal supply generally include canned shrimp, canned crabmeat, and similar commodities which are relatively unimportant in military and lend-lease purchases.

Stocks of frozen fish amounted to 74 million pounds on February 1 showing a drop of 24 million pounds in 1 month. Frozen fish have continued to move rapidly into the market, partly because of the restriction on the sale of canned fish prior to rationing.

With shortages in manpower and ships, the catch of fish this year is expected to be even less than the small 1942 catch of 3.7 billion pounds. Production of fishery products is estimated to be little more than half of the present civilian, military, and lend-lease demand.

Poultry Products

Egg production in the United States is likely to continue the largest on record throughout 1943. In the first 3 months of the year, production on farms was 17 percent larger than in the corresponding period of 1942. Much of the increased production apparently is going into current consumption. The movement of eggs into storage during the first quarter of 1943 was larger than a year earlier. To aid in its dried-egg procurement program the Food Distribution Administration has issued Food Distribution Order No. 40 which provides that all shell eggs in cold storage on May 31 shall be set aside for governmental agencies. After May 31 no shell eggs may be stored except for Government use. The demand for eggs probably will increase considerably as a result of meat rationing and even though the expected increased farm production of eggs is not entirely absorbed by heavier drying operations, the demand is likely to exceed the supply.

The Office of Price Administration has established weekly maximum prices that may be charged retailers for specific grades of eggs and definite mark-ups for use by retailers in determining their maximum selling prices for each week. The maximum price farmers may charge when selling directly to consumers is 1.17 times the maximum price to retailers for the retail grade at the time and place of delivery.

Hatchery production of baby chicks is establishing new high levels, bearing out previous indications of a new record supply of chicken meat for 1943. The increase in chicken will come mostly in the second 6 months of the year, however. In the first few months of rationing of red meats, supplies of poultry will be at a seasonally low level. In the past several weeks, prices of all classes of poultry have been at ceiling levels and the demand has exceeded the supply. Turkey growers' early spring intentions were in line with the increase needed to reach the turkey production goal which is 560 million pounds, dressed weight, compared with a little less than 500 million pounds in 1942. The consumer demand for both chickens and turkeys, except possibly for short periods of peak marketings, is likely to exceed the supply.

Dairy Products

Largely as a result of the rapid increase in military and lend-lease requirements, the per capita supply of all milk and dairy products for civilian consumption, on a milk equivalent basis, may total only about 770 pounds in 1943, compared with a 1935-39 yearly average consumption of 806 pounds and the record high 1942 consumption of 854 pounds. Although the number of milk cows on farms on January 1 was 2 percent above a year earlier, the general scarcity of labor and strong competition of hogs for feed and labor may result in a slightly smaller total milk production in 1943 than in 1942 unless summer pasture conditions are again unusually favorable. Stocks of dairy products at the beginning of 1943 were 30 percent above average. Stocks at the beginning of 1944 will have to be 50 to 60 percent above average if prospective military and lend-lease demands are to be met during the first quarter of 1944 and if civilian consumption in this period is to be held at approximately the same level as in the last three quarters of 1943.

Civilian per capita supply of butter in 1943, under the rationing program (page26), will be about 20 percent below last year's level and 25 percent below the 1935-39 average consumption per year. Cheese supply will be around 10 percent below the record high level in 1942 but will be about equal to average consumption. Lend-lease allocations for cheese have been sharply reduced so that domestic consumption may not fall below the 1935-39 average level. Consumption of fluid milk for the United States as a whole, is expected to continue its upward trend during 1943, although consumption in some areas may be curtailed. Civilian per capita consumption of condensed and evaporated milk, on the other hand, may be 15 percent smaller than in 1942, although about the same as in 1935-39. Milk solids used in ice cream for civilian consumption will be limited to 65 percent of last year's record high level, but the actual volume of frozen dairy products produced probably will be reduced by a much smaller quantity since formulas will be adjusted to obtain more volume per unit of milk solids.

Although total milk production in January and February was about 1 percent larger than a year earlier, the milk equivalent of dairy products manufactured was smaller. Hence, it appears that consumption of fluid milk is continuing somewhat larger than a year earlier. With the fat content of fluid cream limited to 19 percent and the quantity of ice cream manufactured for civilian consumption limited to 65 percent of last year's output, butter production during February was about 5 percent larger than a year earlier. Production of cheese and evaporated milk continues below last year's unusually high level but is larger than in previous years. The order setting aside 30 percent of the current production of butter for direct war requirements reduced supplies available for civilian consumption in February and March below those in January but the order setting aside 50 percent of the Cheddar cheese production for such purposes, effective February 15, had little effect on immediate civilian consumption as commercial stocks on hand were fairly large.

Since milk production reaches a peak in May and June, stocks of dairy products need to be accumulated during the second quarter to meet consumption requirements in the short supply season from October through February.

If sufficient stocks are accumulated to maintain consumption at approximately the same level in the third and fourth quarters of 1943 as in the second quarter, supplies of all milk and dairy products, on a milk equivalent basis, in the second quarter may total about 200 pounds per capita, compared with 230 pounds in the second quarter of 1942, 220 pounds in the corresponding period in 1935-39, and 197 pounds in the first quarter of 1943. Consumption of fluid milk in the second quarter is expected to continue to increase, both in relation to a year earlier and to the first quarter of this year. Supplies of butter under the rationing program in the second quarter may be slightly larger than in the first quarter of 1943 but will be about 25 percent smaller than in the corresponding months of either 1941 or 1942. Consumption of condensed and evaporated milk also may decrease sharply, depending on the extent to which stocks are accumulated.

The civilian consumption of cheese under the announced ration may average about 1.4 pounds per capita during the 3-month period beginning April 1 and ending June 30. This average, which excludes cottage, pot, and bakers' cheese, is based on a civilian allocation of 170 million pounds during the second quarter of 1943. The average, of course, does not necessarily indicate the amount available for each civilian. Non-eaters of cheese will leave more available for those consumers who normally use large amounts and who will use more than the average number of points for this commodity.

Food Fats and Oils

Rationing of food fats and oils began on March 29. Butter, margarine, lard, shortening, and cooking and salad oils are to be obtained by consumers under point rationing along with meats, cheese, and canned fish. Food fats used by commercial bakers and other manufacturers of food products also are rationed. The total allocation of food fats for both direct and indirect consumption is equivalent to 33 pounds per capita for the 9-month period April-December 1943, or 44 pounds per capita on an annual basis. Because of the high rate of consumption during the first quarter of 1943, the total for the year is expected to be about 46 pounds per capita. This compares with an average of about 50 pounds in the past 3 years and 48 pounds annually in 1935-39.

Production of animal fats and crude vegetable oils, as a whole, normally is smaller in the second quarter of the year than in the first. The seasonal decline this year will be less pronounced than usual due to increased output of soybean oil in southern mills and to a smaller than usual seasonal decline in lard production.

Factory stocks of food fats and oils (excluding butter) on January 1 were about average for that date. Stocks usually increase during the first quarter. However, consumption kept approximate pace with production during the first quarter this year, and stocks on April 1 probably were not materially greater than on January 1.

Fruits

A larger than average apple crop or near record soft fruit and grape crops must be obtained in 1943 if total deciduous fruit and grape production is to reach the 1942 level. The labor supply available for harvesting operations, moreover, will significantly affect the quantity of such fruits entering market channels. Even with favorable growing weather and harvesting conditions the 1943 fruit pack probably will not reach the record pack of 1942. Such factors as tin restrictions and a strong consumer demand for fresh fruit resulting from rationing of canned goods may greatly affect the quantity of total fruit canned.

The total crop of oranges and tangerines, now moving to market, is expected to be about 2 percent larger than that produced last year. The total crop of grapefruit is expected to exceed all previous records. The 1942-43 pack of canned grapefruit segments will be small because of tin restrictions, but the pack of grapefruit juice is not subject to tin restrictions and may be almost twice that of last year. Through Government order, stocks of grapefruit juice were "frozen" for the first 3 months of 1943 to encourage consumers to use fresh fruit coming to market. Upon release of canned juices, sales have become subject to rationing under the point system now in effect on all canned goods.

Cold-storage stocks of apples in the first quarter of this year were considerably larger than those of a year earlier, and carlot shipments in the first quarter have also been heavier, reflecting the large production of apples in 1942. March 1 cold-storage stocks of frozen fruits (145 million pounds) were 2 percent larger than those of the same date in 1942. It is likely that processors will continue to freeze large quantities of fruits and that the demand for these products will be heavy.

Vegetables

Plantings of early vegetables in the South have been reduced by 10 to 12 percent below a year ago and 1943 intended acreage for onions and cabbage is considerably smaller than last year. If these trends continue, it is quite possible that commercial fresh vegetable acreage may be reduced 5 to 10 percent below last season. The supply of commercial fresh vegetables will depend to a large extent on weather, labor, and transportation facilities. The civilian supply of fresh vegetables this year, however, is expected to be greatly augmented by home-grown vegetables as a result of the Victory Garden movement.

Supplies of the major fresh vegetables will be relatively short during the next 2 or 3 weeks. Frosts in January, February, and early March caused some damage in winter-vegetable areas, and the season will be delayed. Reductions in supplies will be most noticeable in peas, cabbage, cantaloups, cucumbers, onions, eggplant, and watermelons. Plantings of most of the important winter and spring vegetables for the 1943 season were about 11 percent smaller than last year and early frosts may further reduc acreage for harvest. Since rationing of processed vegetables probably will stimulate further the greatly increased demand for fresh vegetables, relatively short supplies during the next month may prevent prices from falling below price ceilings.

According to March 1 intentions to plant, potato growers plan to increase potato acreage about 14 percent above last year. However, the 1943 intentions are 2 to 3 percent short of the goal acreage. With average growing conditions and normal rate of abandonment, the 1943 intended acreage may be expected to yield a crop of 400 million bushels which is about 8 percent larger than in 1942. Taking present military and Allied requirements into consideration, a 400-bushel crop of potatoes would give civilians about 130 pounds per capita compared with 125 pounds for 1942-43 and an average of 131 pounds for 1935-39. In view of the increased demand, prices of potatoes are expected to continue at high levels.

Potato stocks on January 1, 1943 were 101 million bushels compared with 103 million at the same time last year. The 1942 late storage crop was about 3 percent larger than that of 1941, but greatly increased movement of potatoes this season cut down the January carry-over stocks and is further reducing available supplies at a rapid rate.

Most of the early-crop potatoes in North Florida have been damaged by frost which delayed harvest and reduced yields. Prospects are good for early Texas crops, where harvesting is expected to begin early in April.

Prospective plantings of dry beans for 1943 as expressed by farmers on March 1 were 2,480,000 acres, 16 percent above last year, but considerably less than the 3.3 million acre goal. Under average growing conditions this acreage may be expected to yield a crop of 19 million bags. After war requirements are met, this crop would give civilians about 8 pounds per capita which is only slightly less than the expected consumption in the 1942-43 crop year. However, intensive appeals and higher support prices may bring about a larger output.

Wheat, Rye, and Rice

The production of all wheat in 1943 may be about 729 million bushels consisting of 559 million bushels of winter wheat as estimated by the April 1 crop report and an allowance of 170 million bushels for spring wheat. The spring wheat figure is based on prospective plantings and the assumption of average abandonment and a yield equal to the post-drought years 1937-41. A total wheat crop of this size would be 80 million bushels larger than that expected under the acreage goals, and if taken together with the stocks on January 1 of 1,162 million bushels would point to a total domestic supply of about 1,891 million bushels. While supplies of this size are very large -- second only to those of a year earlier -- a record total disappearance of 1 billion bushels or more is expected in 1943.

With many foods rationed it is probable that greater use of bread, macaroni and other wheat products will increase the civilian per capita consumption of wheat from 222 pounds in 1935-39 to about 240 in 1943. Record quantities are being used for livestock feed and alcohol production, and exports are also showing some increase. As a result of the large disappearance, stocks on December 31 may be reduced by 300 to 350 million bushels compared with stocks at the beginning of the year. Remaining stocks, however, would be adequate to provide for domestic and foreign requirements until the 1944 harvest and leave a carry-over on July 1, 1944 of at least 250 million bushels.

Total rye disappearance in 1943 may be about 60 million bushels. This estimate takes into account some increase in per capita consumption and a substantial increase in the use of rye for feed. With large stocks at the beginning of the year, favorable prospects for the crop, and the likelihood of imports, it is expected that all requirements will be met and leave a stock at the end of the year about as large as on January 1.

A rice acreage 9 percent above the goal and the same as last year was indicated by the intentions report. On the basis of the 1938-42 average yield (which was higher than the yields in 1942) this acreage would result in a crop of about 73 million bushels. This would be by far the largest crop on record, and for the crop year beginning August 1943 would take care of average per capita consumption in this country, prospective exports and shipments, and leave a moderate carry-over. However, because of the reduced 1942 crop as the result of storms last summer and large war requirements, a small quantity remains for domestic consumption up to the 1943 harvest, and the supply available for civilian consumption for the calendar year 1943 is reduced to about 4.9 pounds per capita compared with an average of 5.8 pounds for the period 1935-39.

Corn, Oats, and Barley

The March "Prospective Plantings" survey indicates that the corn acreage in 1943 will be 6 percent greater than the acreage planted in 1942. The prospective acreage of oats is about the same as in 1942 and for barley slightly less. The combined production of the three major feed grains based on the 1943 intended acreage may be about 11 percent smaller than in 1942 if yields are about average. In order to maintain feeding operations in 1943-44 at the 1942-43 level, if yields are only about average, it will be necessary to greatly reduce the reserve stocks of these grains and to increase the quantity of wheat fed to livestock.

It is estimated that about 275 million bushels of wheat and about 30 million bushels of rye will be fed during the 1942-43 marketing year beginning July 1. The quantity of wheat fed in 1943-44 probably cannot be increased, without reducing stocks of wheat at the close of the 1943-44 marketing year below 250 million bushels, which may be considered a minimum reserve. The quantity of rye fed may be increased to 60 million bushels, and the total imports of oats, barley, and feed wheat from Canada may also be increased. The quantity imported, however, will depend largely on transportation facilities and on 1943 production of these grains in Canada. After adjusting the 1943-44 disappearance of feed grains to allow for the prospective larger supplies of feed from these sources, with livestock feeding maintained at the 1942-43 level, the carry-over of feed grains may fall a little below the 1935-39 average, and the number of livestock on farms will be considerably larger than in that period.

The 1943 production of oilcake and meal based on prospective acreage of oilseeds is expected to be larger than in 1942-43 but with a larger quantity of soybean meal being used for food the prospects are for a slightly smaller supply available for livestock feeding.

Table 4.- Total food supplies, 1935-39 average, 1940, 1941, 1942 and estimated 1943, calendar years 1/

Commodity	Unit	1935-39	1940	1941	1942	1943
Total meats (dressed weight) 2/	Mil. lb.	17,050	19,720	20,590	22,835	23,940
Fish 3/						
Fresh and frozen, (dressed weight)	"	---	---	820	875	887
Canned fish and shellfish	"	---	---	1,228	1,003	910
Cured fish	"	---	---	160	140	120
Poultry Products						
Eggs	Mil. doz.	3,431	3,710	3,920	4,549	5,236
Chickens (dressed weight)	Mil. lb.	2,436	2,535	2,783	3,154	4,152
Turkeys (dressed weight)	"	374	534	529	548	596
Dairy Products						
Total milk 4/	"	107,376	112,491	118,207	125,456	122,233
Butter, farm and factory	"	2,243	2,296	2,313	2,293	2,145
Cheese 5/	"	833	927	1,106	1,344	1,127
Condensed and evaporated milk	"	2,409	2,922	3,751	4,223	4,746
Ice cream	"	1,232	1,495	1,834	2,045	1,500
Dried whole milk	"	24	34	51	66	107
Malted milk	"	18	20	23	25	25
Fluid milk and cream 6/	"	44,245	45,676	46,495	50,228	52,105
Fats and Oils (excluding butter) 7/						
Lard 8/	"	1,715	2,475	2,508	2,603	2,751
Compounds and vegetable cooking fats	"	1,586	1,254	1,473	1,339	1,765
Margarine	"	303	257	297	349	535
Other food products and uses 9/	"	1,800	2,056	2,111	2,256	2,208
Total fats and oils	"	5,404	6,042	6,389	6,547	7,259

Continued -

Table 4.- Total food supplies, 1935-39 average, 1940, 1941, 1942 and estimated 1943, calendar years 1/ - Continued

Commodity	Unit	1935-39	1940	1941	1942	1943
Fruits						
Fresh (excluding melons)						
Citrus 10/	Mil. lb.	6,779	6,511	8,135	8,189	8,178
Apples 11/	"	7,600	6,881	6,173	6,067	6,417
Other fresh 12/	"	7,844	7,559	8,137	6,303	5,655
Canned fruits 13/	"	2,511	2,566	3,152	3,385	2,844
Canned juices 14/	"	676	1,110	1,439	1,312	1,630
Frozen 15/	"	199	300	345	385	402
Dried 16/	"	1,508	1,289	1,241	1,193	1,400
Vegetables						
Fresh 17/						
Leafy, green and yellow 18/	1,000 tons	---	---	4,173	4,501	4,121
Tomatoes	"	---	---	1,331	1,393	1,419
Melons 19/	"	---	---	1,978	1,788	1,339
Other 20/	"	---	---	3,483	3,740	3,375
Canned 21/	1,000 cases 24 No. 2's	---	---	207,235	238,955	220,100
Potatoes 22/	1,000 bu.	358,858	374,900	362,327	371,519	401,000
Sweetpotatoes 23/	"	67,927	52,243	62,144	65,380	70,000
Beans, dry edible 23/	1,000 100 lb. bags	15,655	19,399	20,711	25,987	26,963
Sugar 24/	1,000 short tons	9,450	9,980	11,212	9,229	8,480
Grains						
Wheat	Mil. bu.	1,256	1,419	1,673	1,983	1,891
Rye	"	75	70	96	111	133
Rice	"	86	94	89	99	111
Corn	"	3,688	4,505	4,710	5,358	5,197
Oats	"	1,676	1,872	1,988	2,130	2,117
Barley	"	378	493	578	672	672
Coffee	Mil. lb.	1,933	2,219	2,736	2,140	2,005
Tea	"	128	139	158	115	87
Cocoa	"	719	839	1,248	775	729

Continued -

Table 4.- Total food supplies, 1935-39 average, 1940, 1941, 1942 and estimated 1943, calendar years 1/ - Continued

1/ Production, imports, and stocks at the beginning of the year. Estimated 1943 production of crops is based on average yields and acreage given in the March report on farmers' intentions to plant, and the April 1 crop report. Non-crop commodities are based on expected production. The supply figures for many commodities for previous years have been revised. 1942 figures are still preliminary.
2/ Because of black market operations and other factors, estimates of meat production are difficult, and are subject to substantial revision.
3/ Data on fish for 1935-39 and 1940 not available on a comparable basis. The Department of Interior estimates that per capita consumption of fish products averaged 13.3 pounds for the period 1935-39.
4/ Total milk for human consumption.
5/ All cheese, excluding cottage, pot, and bakers'.
6/ Milk and cream in terms of fluid milk equivalent.
7/ Fat content.
8/ Lard and rendered pork fat excluding use in manufactured products.
9/ Includes edible beef fats and oils, corn oil, cottonseed oil, linseed oil, edible olive oil, peanut and soybean oil. In terms of crude oil.
10/ Oct.-Nov. year.
11/ Commercial only, for 1941, 1942, 1943.
12/ Includes apricots, avocados, bananas, cherries, cranberries, figs, grapes, olives, peaches, pears, pineapples, plums and prunes, and strawberries.
13/ Includes citrus, apples, apricots, berries, cherries (sweet), cherries RSP, cranberry sauce, figs, fruit cocktail, fruits for salad, olives, peaches, pears, pineapples, plums, and prunes. Pack year basis.
14/ Includes concentrated juices, single strength, grapefruit, orange, lemon, mixed citrus, grape (except wine) pineapple, prune, and nectar juices. Data on apple juice is not available.
15/ Principally cherries, strawberries, and other berries.
16/ Includes dried apples, apricots, peaches, pears, prunes, raisins, dates and figs. Pack year.
17/ Includes estimated production of market gardens. Comparable data for 1935-39 and 1940 are not available.
18/ Includes asparagus, snap beans, cabbage, carrots, lettuce, green peas and spinach.
19/ Cantaloups and watermelons.
20/ Includes artichokes, lima beans, beets, cauliflower, celery, sweet corn, cucumbers, eggplant, garlic, kale, onions, green peppers, and shallots. Comparable figures for 1935-39 and for stocks are not available.
21/ Includes asparagus, snap beans, carrots, green peas, spinach, bulk kraut, tomatoes (whole, paste, pulp and puree, sauce, juice, and catsup), lima beans, beets corn, pimientos, pumpkin and squash, vegetable puree (baby food), hominy, sweetpotatoes, potatoes, other minor packs, and pickles in bulk. In 1941-42, "other" includes a long list of minor vegetables most of which were not packed in 1942-43 and 1943-44. Calculated on a pack year basis. Stocks not available.
22/ Fiscal year basis.
23/ Crop year. Beans are on a cleaned basis.
24/ Raw basis.

Table 5.- Year-end food stocks, 1935-39 average, 1940, 1941, 1942 and estimated 1943, calendar years 1/

Commodity	Unit	1935-39	1940	1941	1942	1943
Total meats (dressed weight)	Mil. lb.	562	768	612	727	1,745
Fish						
Canned fish and shellfish	"	---	---	346	169	168
Poultry products						
Eggs	Mil. doz.	78	77	125	224	303
Chickens (dressed weight)	Mil. lb.	109	140	161	149	160
Turkeys (dressed weight)	"	31	61	50	35	50
Dairy products						
Total milk	"	3,009	2,729	5,596	3,818	4,691
Butter	"	66	41	114	25	100
Cheese	"	109	130	202	131	119
Condensed and evaporated milk	"	188	196	412	826	573
Dried whole milk	"	3	5	6	7	10
Fluid milk and cream	"	101	95	228	110	60
Fats and oils (excluding butter)						
Lard	"	104	294	187	91	149
Compounds and vegetable cooking fats	"	49	54	53	43	43
Other food products and uses	"	963	1,011	944	1,001	634
Total fats and oils	"	1,116	1,359	1,184	1,135	826
Fruits						
Fresh apples	"	1,568	1,545	1,237	1,468	1,325
Canned fruits 2/	"	256	142	171	3/ 655	3/ 670
Canned juices	"	9	6	42	3/ 368	3/ 185
Frozen	"	106	143	187	188	188
Dried 2/	"	315	235	154	180	180
Beans, dry edible 4/	1,000 100 lb. bags	2,219	3,500	4,897	5,463	4,500
Sugar	1,000 s. tons	2,664	3,274	3,657	2,500	2,400
Grains						
Wheat	Mil. bu.	517	724	1,001	1,162	780
Rye	"	29	32	54	66	70
Rice	"	34	38	33	38	41
Corn	"	1,574	2,033	2,182	2,346	2,100
Oats	"	675	801	761	897	750
Barley	"	150	214	239	290	250
Coffee	Mil. lb.	5/ 105	482	543	205	250
Tea	"	40	51	49	22	18
Cocoa	"	5/ 131	555	575	281	200

1/ Stocks on commodities not listed are not available. Stocks at the end of 1943 include commercial stocks and Government holdings. For general notes and lists of items included where groups of items are given, see footnotes, table 4. 2/ Pack year basis. 3/ Includes packers' and wholesalers' stocks. 4/ Crop-year basis. 5/ Partial wholesale stocks only.

Table 6.- Apparent civilian consumption on a per capita basis, 1935-39 average, 1940, 1941, 1942 and estimated 1943, with percentage comparisons 1/

Commodity	1935-39	1940	1941	1942	1943	1943 as a percentage of			
						1935-39	1940	1941	1942
	Lb.	Lb.	Lb.	Lb.	Lb.	Pct.	Pct.	Pct.	Pct.
Total meats (dressed weight) 2/	126	142	143	140	124	98	87	87	89
Fish									
Fresh and frozen (dressed weight)	---	---	6.0	5.7	5.6	---	---	93	98
Canned fish and shellfish	---	---	4.9	3.3	2.4	---	---	49	73
Cured fish	---	---	.9	.8	.6	---	---	67	75
Poultry products									
Eggs 3/	37.5	39.9	39.3	40.0	39.9	106	100	102	100
Chickens (dressed weight)	18.0	18.1	19.5	21.9	28.4	158	157	146	130
Turkeys (dressed weight)	2.7	3.6	3.6	3.8	3.9	144	108	108	103
Dairy products									
Total milk	806.5	826.0	814.0	854.1	770.5	96	93	95	90
Butter, farm and factory	16.8	17.0	16.0	16.0	12.7	76	75	79	79
Cheese	5.6	6.0	6.1	6.4	5.7	102	95	93	89
Condensed and evaporated milk	16.8	19.3	18.4	19.7	16.8	100	87	91	85
Ice cream	9.6	11.3	13.7	15.2	9.5	99	84	69	62
Dried whole milk	.13	.16	.17	.13	.09	69	56	53	69
Malted milk	.11	.12	.13	.15	.18	164	150	138	120
Fluid milk and cream	342.3	345.4	350.1	381.1	396.7	116	115	113	104
Fats and oils (excluding butter)									
Lard	11.0	14.8	14.3	14.0	14.0	127	95	98	100
Compounds and vegetable cooking fats	11.9	9.0	10.5	8.9	8.5	71	94	81	96
Margarine	2.3	1.9	2.2	2.3	3.6	157	189	164	157
Other food products and uses	6.3	7.6	8.4	8.5	7.6	121	100	90	89
Total fats and oils	31.5	33.3	35.4	33.7	33.7	107	101	95	100
Fruits									
Fresh (excluding melons)									
Citrus	48.2	46.0	57.5	55.2	53.9	112	117	94	98
Apples	43.1	39.9	36.3	32.9	35.9	83	90	99	109
Other fresh	59.1	56.4	60.3	46.1	41.5	70	74	69	90
Canned fruits 4/	15.0	17.8	20.0	15.5	7.6	51	43	38	49
Canned juices	5.2	8.4	10.6	6.1	5.9	113	70	56	97
Frozen	.7	1.2	1.2	1.5	1.7	243	142	142	113
Dried 4/	6.1	6.9	3.7	4.1	4.1	67	59	111	100

Continued -

Table 6.- Apparent civilian consumption on a per capita basis, 1935-39 average, 1940, 1941, 1942 and estimated 1943, with percentage comparisons - Continued

Commodity	1935-39	1940	1941	1942	1943	1943 as a percentage of			
						1935-39	1940	1941	1942
	Lb.	Lb.	Lb.	Lb.	Lb.	Pct.	Pct.	Pct.	Pct.
Vegetables									
Fresh 5/									
Leafy, green, and yellow	---	---	78.6	81.7	68.9	---	---	88	84
Tomatoes	---	---	25.7	25.9	25.1	---	---	98	97
Melons	---	---	38.5	33.3	24.5	---	---	64	74
Other	---	---	63.6	65.9	54.6	---	---	86	83
Canned 4/	---	---	42.4	40.9	29.7	---	---	70	73
Potatoes 6/	130.7	132.6	127.1	125.1	129.7	99	98	102	104
Sweetpotatoes 7/	23.4	17.7	20.9	21.4	21.6	92	122	103	101
Beans, dry edible 7/	8.9	9.3	8.8	8.4	7.9	89	85	90	94
Sugar 8/	97.0	92.4	105.1	87.3	68.5	71	74	65	78
Grains									
Wheat	222.4	219.1	220.1	224.2	240.8	108	110	109	107
Rye	3.9	3.8	3.8	3.9	4.4	113	116	116	113
Rice 9/	5.8	6.1	5.5	6.2	4.9	84	80	89	79
Corn	57.3	59.0	64.8	74.7	73.7	129	125	114	99
Oats	6.9	7.0	7.1	7.9	8.0	116	114	113	101
Barley 10/	21.6	20.1	22.6	27.2	27.8	129	138	123	102
Coffee	14.0	15.5	16.1	13.5	9.6	69	62	60	71
Tea	.7	.7	.8	.5	.2	29	29	25	40
Cocoa	4.4	4.9	4.8	3.4	3.0	68	61	62	88

1/ Estimates for 1935-39 and 1940 are derived by dividing total domestic disappearance by total population. Total military consumption in these years is not available and is assumed to be negligible since the size of the armed forces was small. For general notes and lists of items included where groups of items are given, see footnotes, table 4.

2/ Per capita consumption for 1943 is for the entire year which is slightly higher than the current ration allotment.

3/ In terms of number of eggs, the apparent per capita consumption was 300 in 1935-39, 319 in 1940, 314 in 1941, 320 in 1942, and is estimated at 319 in 1943.

4/ Pack year basis.

5/ Includes estimated market garden production. Since no data are available on farm garden production, per capita estimates are based on urban population. Comparable data for 1935-39 and 1940 are not available.

6/ Fiscal year basis.

7/ Crop year basis.

8/ Refined basis. The 1943 figure is based on present allotments under rationing.

9/ Milled basis.

10/ Includes malt liquors, malt extracts, and other food products.

RETAIL FOOD COSTS, JANUARY AND FEBRUARY 1943

The Bureau of Labor Statistics mid-month index of 133.6 for retail costs of all foods in February represents an increase of 0.5 percent above January, 0.7 percent above December, 8.4 percent above June, and 14.4 percent above February 1942, or an average increase of 1.2 percent per month for the 12 months.

Prices of foods subject to price control advanced an average of 0.5 percent from December to February. The decline of 13.8 percent in the price of eggs and 15.2 percent for oranges offset sharp increases in some other commodities -- roasting chickens, 6.7 percent; evaporated milk, 9.8 percent; potatoes, 12.0 percent; and onions, 24.0 percent. However, prices of both eggs and oranges are still considerably higher than a year ago, and the price of onions is lower.

Prices of foods not subject to price control advanced 2.0 percent in February over December. Price changes ranged from decreases of 15.1 percent for carrots and 12.5 percent for lettuce to increases of 11.2 percent for green beans, 22.4 percent for sweetpotatoes, and 43.5 percent for cabbage. Prices of carrots and lettuce are still considerably higher than a year ago. The changes in prices of some of these commodities from December to February are partly seasonal in nature.

At the time the February index was prepared, approximately 10 percent of the family food bill still consisted of foods not subject to price control. Since maximum prices have subsequently been established for certain fresh vegetables, there now remains only about 4 percent of all the foods included in the Bureau of Labor Statistics index not subject to price control -- fresh and frozen fish, fresh apples, and fresh sweetpotatoes. (For a summary of retail price ceilings between January 1-April 1, 1943, see pages 30 to 32.)

Table 7.- Index numbers of retail food prices and total cost of living, United States, specified periods (1935-39 = 100)

Year and month	Meats	Eggs	Dairy products	Fats and oils	Cereals and bakery products	Fruits and vegetables				Sugar	All foods	Total cost of living
						Fresh	Canned 1/	Dried	Total			
1941	108	112	112	94	93	104	98	107	103	106	106	105
1942	126	136	125	120	105	133	122	136	131	127	124	116
1941												
Jan.	101	97	105	80	95	93	91	100	93	95	98	101
Feb.	102	85	104	81	95	96	92	100	96	96	98	101
Mar.	102	83	105	81	95	98	92	99	97	98	98	101
Apr.	104	92	106	85	95	102	93	100	101	105	101	102
May	104	94	108	88	95	106	94	103	104	107	102	103
June	107	104	110	92	96	116	96	105	112	107	106	105
July	109	115	112	97	96	109	98	106	107	108	107	105
Aug.	111	121	114	99	99	104	100	109	103	109	108	106
Sept.	116	133	118	103	101	99	102	111	100	112	111	108
Oct.	113	137	120	106	102	104	104	113	104	112	112	109
Nov.	110	146	121	107	102	111	105	116	110	113	113	110
Dec.	111	138	120	108	102	111	106	118	110	114	113	110
1942												
Jan.	116	131	122	111	103	119	109	122	117	118	116	112
Feb.	118	119	122	114	104	118	115	125	118	128	117	113
Mar.	120	112	122	117	105	124	121	128	123	128	119	114
Apr.	122	111	122	120	105	126	122	131	126	128	120	115
May	124	115	123	122	105	130	123	131	129	127	122	116
June	127	120	122	120	105	137	122	133	134	127	123	116
July	128	130	123	120	105	139	122	134	136	127	125	117
Aug.	130	146	126	120	105	135	123	139	133	127	126	118
Sept.	131	155	128	121	105	130	124	143	130	127	127	118
Oct.	131	165	131	121	106	139	125	150	137	127	130	119
Nov.	132	166	132	124	106	145	127	150	142	127	131	120
Dec.	133	167	132	125	106	151	128	150	147	128	133	120
1943												
Jan.	135	166	134	126	106	147	129	154	144	127	133	121
Feb. 2/	136	144	136	126	106	153	131	156	149	127	134	121

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Canned weight.

2/ Preliminary.

FOODS RATIONED IN THE FIRST QUARTER OF 1943

Consumer rationing under the point system of the following processed foods began on March 1: (1) All fruits, fruit juices, vegetables, vegetable juices, soups, and baby foods, packed in hermetically sealed containers of any type and sterilized by the use of heat; (2) All frozen fruits and vegetables; (3) All dried and dehydrated fruits and soups; and (4) All dry beans, lentils, and peas. (Dried fruits were taken off the list of rationed foods on March 29.) The blue stamps from War Ration Book Two are being used for those commodities as a group. On March 29 the following items were added to the list of rationed foods: (1) All fresh, frozen, cured, smoked, and canned meats and meat products as well as "variety meats" and sausages; (2) Canned fish and canned shellfish; (3) The most important natural and processed cheeses, but not the cottage type and cream cheeses; and (4) Edible fats and oils, including butter, lard, margarine, shortening, salad oils, and cooking oils (excluding mayonnaise and salad dressings). The red stamps of War Ration Book Two are being used for these commodities as a group. (Poultry, game, and fish other than canned fish are not rationed).

All restaurants, hotels, and other institutional users will be allotted supplies of the rationed foods on a basis that will reduce their use to approximately the same level as that of the private individual who eats at home. Farmers are being urged to economize on their consumption of home-produced foods and to limit their purchases of the rationed foods not produced at home. They will receive a full quota of points, however. When a farmer sells any of his home-produced butter, meat, or other rationed food he automatically become a distributor and must collect ration stamps, checks or certificates when making a sale and surrender the collected points to the Office of Price Administration.

THE FOOD SITUATION IN WORLD WAR I

Even before the declaration of war against Germany in April 1917, shortages in several food commodities, especially sugar and wheat became apparent. In May 1917 the wholesale price of a barrel of flour at Minneapolis was about $14.90; in the previous December it had been $8.70. Sugar prices were also rising and both commodities were being hoarded by consumers. The general rise in prices was ascribed by the public to speculation and profiteering. In line with popular demand and with the necessity of feeding the Allies, President Wilson, on May 17, 1917, appointed Herbert Hoover Food Administrator and urged Congress to pass a food control act as soon as possible.

Until the Lever Bill became law on August 10, 1917, the Food Administrator operated without statutory authority and was sustained by allowances from the President's emergency fund. The Food Control Act and the Food Production Act, passed on the same day, defined the spheres of the Food Administration an the Department of Agriculture, respectively. To the Department fell the task of encouraging food production by the intensification of its war against pests and diseases and by the dissemination of market and other information. The Food Administration, on the other hand, had extensive license control over distributors and processors and was empowered to enter into voluntary agreements with producers.

The most important problem of the Food Administration was the provisioning of the civilian population of the Western Allies. The "strategic" foods of the first World War were nonperishables providing maximum food values in proportion to bulk and weight such as wheat, sugar, meat, (chiefly pork) flour, and canned fish. Of these, only sugar and wheat were ever in dangerously short supply and the Food Administration held tight control over both commodities. The crisis in sugar was caused by the fact that the Allies and European neutrals were cut off from German and Austro-Hungarian beet fields and were forced to depend on supplies from the United States and Cuba. By agreements with domestic and Cuban producers, the Food Administration was able to stabilize the price of sugar. The rise in wheat prices was checked by the creation of the Food Administration Grain Corporation and the prescription of a "fair price" of $2.20 per bushel of No. 1 Northern Spring at Chicago, for the 1917 crop.

The Food Administration was reluctant to resort to rationing of scarce commodities. Instead, it inaugurated a campaign for the voluntary conservation of important foods. The public was urged to save sugar, meat, fats, and wheat.

Launched with intensive publicity, voluntary conservation of the critical foods met varying fortunes. The meatless and porkless days, instituted late in 1917, were abandoned in the spring of 1918 in the face of a meat surplus which could not be exported and which endangered livestock prices. Patriotic appeals for reduction of sugar consumption were insufficient at a time when incomes were rising and demands for sugar in the form of ice cream, candy, and other products were increasing. Therefore, in the summer of 1918 rationing of sugar was instituted. Retailers were instructed to sell only 3 pounds per person per month for household use and were allowed to use "Honor Cards" or certificates for its distribution. On July 26, a reduction to 2 pounds a month for households was announced and the State Food Administrators were advised to set up their own rationing systems. The 3-pound allowance was later restored.

Wheat was of critical importance to the Allies. Great Britain normally depended on overseas sources for the greater part of her supply, and France and Italy harvested scanty crops in 1917. The wheat of Russia was inaccessible and the availability of stocks in the Southern Hemisphere was reduced by the scarcity of tonnage. Demand, therefore, concentrated on North America. Unfortunately, in the United States the crops of 1916 and 1917 were small. The carry-over at the beginning of the 1917 crop year was only 80 million bushels. In 1918, it was 40 million. These figures were in contrast to the carry-over of 225 million bushels at the beginning of the 1916 crop year.

The Food Administration's answer in the beginning was a strenuous conservation campaign. "Wheatless days" and "no waste" became watchwords in the United States. The results were disappointing. Because of the stabilized price, wheat flour was one of the cheapest foods on the market. In January 1918, in response to an appeal for wheat from Great Britain, the Food Administration took extreme measures. Thirty, and later 45, percent of the larger mills' output was taken by the Government as a reserve for export and other needs, to "safeguard" against the possibility of the failure of conservation. Bakers were required to mix substitutes with wheat flour in the proportion of 1 to 4 and, for households, the 50-50 rule was enforced. This required the purchase of one pound of substitute (i.e., corn meal, barley, potato, and buckwheat flour, etc.) with each pound of wheat flour. The 50-50 rule was not an unqualified success. Its application meant hardship to many, especially in low-income brackets, who were unfamiliar with the taste or preparation of the substitutes. Considerable waste of the substitutes was reported.

In cooperation with the Office of Home Economics of the Department of Agriculture, the Food Administration gave wide publicity to the "balanced diet." Although the concept of "protective" foods had not yet been developed, the agency spread the knowledge of the newly discovered vitamins, A and B, and made an effort to teach the public to think of foods as nutrients instead of in terms of dozens and pounds. Its appeal for domestic conservation of the kinds of foods sent abroad was accompanied by advice to eat more leafy vegetables and to maintain the consumption of milk. Some people contended, however, that the poor in cities could not well afford either fresh vegetables or milk. In this connection, it appears that the home gardens did not significantly reduce the high cost of vegetables. Raymond Pearl, chief of the Statistical Division of the Food Administration, estimated that the total commercial production of sweetpotatoes, beans, peas, onions, and cabbage, and the commercial pack of corn, peas, and tomatoes amounted altogether to only 2 percent of the total calorie production of human foods. Conceding the patriotism of the undertaking, he pointed out that the contribution of the home garden could not be more than a small fraction of the commercial production.

The table which follows shows the importance of American food during the decade, 1914-24. Over 60 percent of the deliveries occurred during the Food Administration's existence and were paid for by United States Treasury loans. The contemporary shipping situation had made the American farm the chief foreign source of Allied food. The greatest demand by the Allies was for grains, especially wheat. While the emphasis on wheat and flour was due to actual deficiencies in those products in the importing countries, it also tends to illustrate the current nutritional concepts both at home and abroad which stressed sufficiency of calories in the diet. It also illustrates the practical and sentimental value placed on bread by low-income groups in Europe and elsewhere. Herbert Hoover said in 1917: "with the lower classes of Europe bread is the fetish of food...without the loaf you could not preserve public tranquillity."

Food and relief delivered during the first World War and the Reconstruction Period, by commodities and major operations

Commodity	Committee for Relief in Belgium, Nov. 1914-Aug. 1919	U. S. Food Administration, Apr. 1917-June 1919	Armistice period, Nov. 1918-Aug. 1919	Reconstruction period Aug. 1919-July 1923	Total Nov. 1914-July 1923
	1,000 tons	1,000 tons	1,000 tons	1,000 tons	1,000 tons
Grain	3,650	11,115	1,085	429	16,279
Flour	454	5,406	1,382	846	8,088
Forage	---	3,502	---	3	3,505
Sugar	56	2,147	48	49	2,300
Pork products	419	1,503	294	33	2,249
Misc. food ...	191	1,017	962	4	2,174
Milk	89	498	56	114	757
Rice	350	158	109	55	672
Clothing and misc.	44	---	548	11	603
Beans and peas	189	120	116	50	475
Corn grits ...	---	---	---	114	114
Soap	43	---	1	3	47
Cocoa	14	---	1	12	27
Medical supplies ...	---	---	5	9	14
Total ...	5,499	25,466	4,607	1,732	37,304

Compiled from *American Food in the World War and Reconstruction Period.* Surface and Bland.

RETAIL CEILING PRICES PLACED ON FOODS, ANNOUNCED JANUARY 1-APRIL 1, 1943

Effective date	Foods	Ceiling Prices
1-8-43	Coffee (including substitutes), canned fish, cooking and salad oils, and hydrogenated and other shortening	Former fixed margins over net cost raised and made mandatory (MPR 238, Am. 7).
1-8-43	Corn meal, canned citrus fruits and juices, condensed and evaporated milk, pure maple syrup, pure cane syrup, flour and flour mixes	Fixed margin over net cost (MPR 238, Am. 7). Corn meal, condensed and evaporated milk, and wheat flour were covered formerly by MPR 280; pure maple and cane syrups, GMPR; canned citrus fruits and juices and flours other than wheat were not under any regulation.
1-14-43	Live and dressed poultry, fresh bananas, cheese, butter, and fresh citrus fruits	Fixed margin over net cost (MPR 268, Am. 1). Bananas at retail were previously under GMPR; all other items, MPR 280.
1-28-43	California grape wine	Permitted increase over specified base maximum prices (Supp. Reg. 14, Am. 94). Formerly under Supp. Reg. 14, Am. 54.
2-2-43	Pretzels; canned chili con carne, shoestring and Julienne potatoes, dried prune products, chicken-and-noodle dinner, chicken-a-la-king, and homestyle chicken	Highest price during March 1942 plus supplier's permitted increase (Rev. MPR 256, Am. 1). Formerly under GMPR.
2-5-43	Wine, except California grape wine and peach wine	Fixed margin over highest price during March 1942 (Supp. Reg. 14, Am. 99). Formerly under GMPR.
2-10-43	Foreign-type cheese	3 cents added to existing ceiling — highest price, September 28-October 2, 1942 (MPR 280, Am. 11).
2-15-43	Processed fish, and macaroni and noodle products	Fixed margin over net cost (MPR 238, Am. 10). Vinegar-cured herring and egg noodles covered formerly by Rev. MPR 256; all other products, GMPR.
2-19-43	Peach wine	Fixed margin over highest price during March 1942 (Supp. Reg. 14, Am. 112). Formerly under GMPR.

Effective date	Foods	Ceiling Prices
8-23-43 to 5-23-43	Ice cream and ice cream mix	Maximum price in effect February 21, 1943, adjusted for reduction in butterfat more than 2-1/2 percent (Supp. Reg. 14, Am. 119). February 21 maximum price for ice cream is highest price during March 1942 (GMPR); and for ice cream mix, highest price September 28-October 2, 1942 (MPR 280).
2-23-43 to 4-24-43	Fresh tomatoes, snap beans (green and wax), carrots, cabbage, and peas	Highest price, February 18-22, 1943 (Tempo. MPR 28). First maximum price established for these foods.
2-25-43 to 4-26-43	Fresh spinach and lettuce	Highest prices, February 20-24, 1943 (Tempo. MPR 29). First maximum price established for these foods.
2-27-43	Salted peanuts	Highest price, December 19-23, 1942 (MPR 335). Formerly covered by Tempo. MPR 23.
3-1-43	Rabbits	Dollars-and-cents ceiling (MPR 334). Formerly under GMPR.
3-1-43	Syrups (including molasses; maple, cane, sorghum, corn, and blended syrups), peanut butter, and vinegar	Fixed margin over net cost (MPR 238, Am. 12). Blended maple and cane syrups formerly covered by Rev. MPR 256; pure maple and cane syrups, MPR 238; sorghum, MPR 250; other items, GMPR.
3-6-43	Fresh tomatoes, snap beans (green and wax), carrots, cabbage, peas, spinach, and lettuce	Regional offices given authority to make local adjustments where established maximum price is higher or lower than maximum price generally prevailing (Tempo. MPR 28, Am. 2; Tempo. MPR 29, Am. 1).
3-8-43	Cakes other than cookies, pastries, doughnuts, sweet yeast-raised goods, and pies	125 percent of maximum price charged by producer for sales to retailer (MPR 319, Am. 2). Formerly under GMPR.
3-11-43	Eggs	Fixed margin over net cost (MPR 268, Am. 4). Formerly under MPR 280.
3-12-43	Bread crumbs	12-1/2 cents per lb. plus cost of packaging materials and transportation charges — making an average of about 15 cents per lb. to consumers (Supp. Reg. 14, Am. 123). Formerly under GMPR.

Effective date	Foods	Ceiling Prices
3-20-43	Live chickens, ducks, geese, and turkeys	Specific differentials between grades at wholesale, tending to result in substantial savings to consumer, since retailer's maximum price is based on a fixed margin (MPR 269, Am. 6).
3-20-43	Guineas, pigeons, and squabs	Ceiling at wholesale level removed. Since retailer's maximum price is based on a fixed margin, increased prices for consumer will probably result. (MPR 269, Am. 6)
3-25-43	Dry edible beans	Country shipper's maximum prices raised. Wholesale and retail prices raised accordingly, because of fixed margins. (MPR 270, Am. 3)
4-1-43	Pork cuts	Dollars-and-cents ceilings (MPR 336). Formerly under GMPR.

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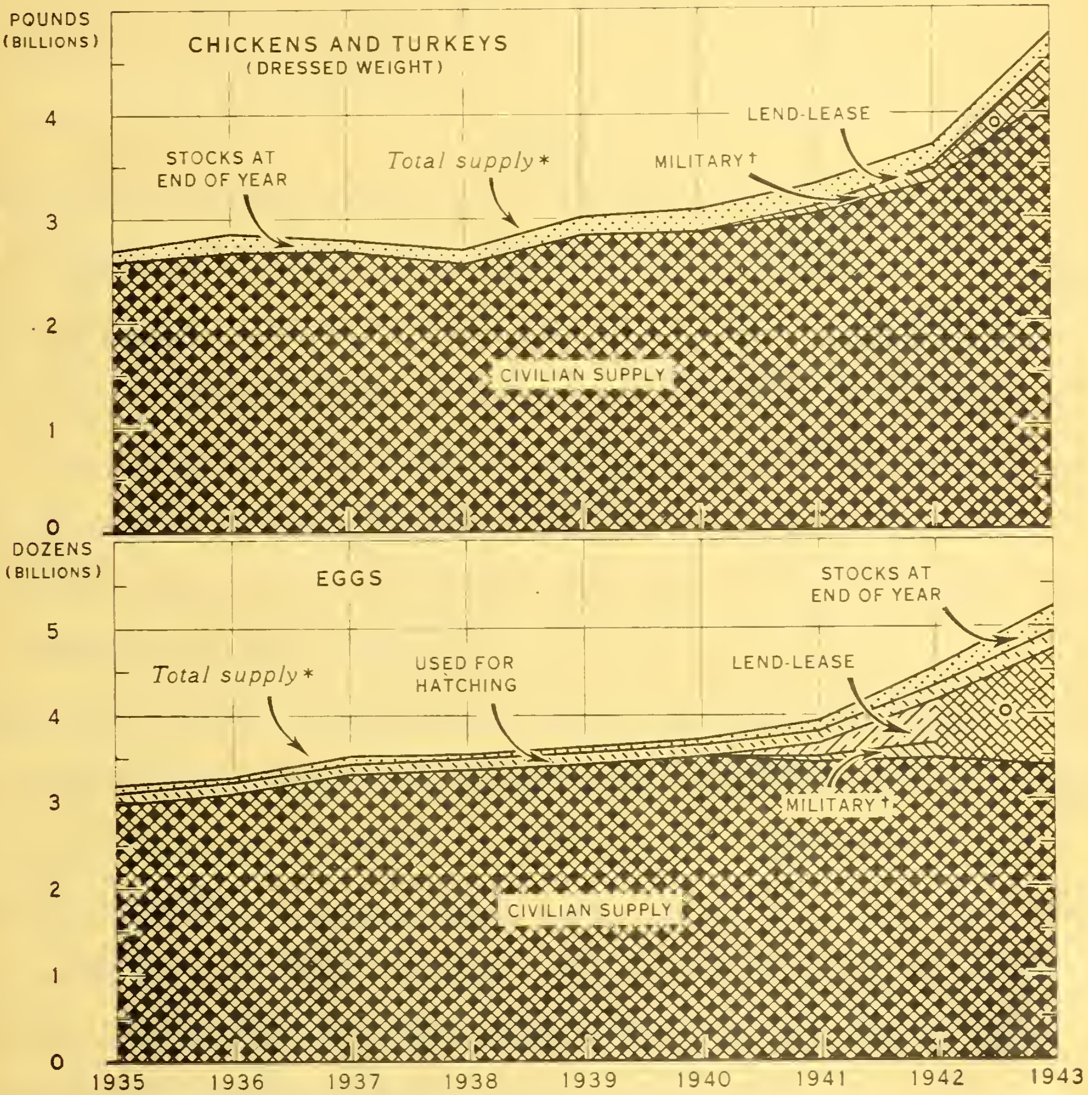
THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-5 BAE MAY 1943

POULTRY AND EGGS: SUPPLY AND DISPOSITION, 1935-43



* PRODUCTION, STOCKS AT BEGINNING OF YEAR, AND IMPORTS

† MILITARY CONSUMPTION NOT SHOWN PRIOR TO 1941, AS IT IS NEGLIGIBLE COMPARED WITH CIVILIAN CONSUMPTION

○ MILITARY AND LEND-LEASE COMBINED, 1943

EXPORTS WERE NEGLIGIBLE FOR YEARS 1935-40; INCLUDED IN LEND-LEASE BEGINNING 1941

DATA FOR 1943 ARE TENTATIVE INDICATIONS

U. S. DEPARTMENT OF AGRICULTURE NEG. 42995 BUREAU OF AGRICULTURAL ECONOMICS

THE NATIONAL FOOD SITUATION

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Summary

Stocks of most rationed foods, together with prospective production, probably will be adequate to maintain the present level of consumption until the end of this year. The storage situation of unrationed commodities is less favorable with respect to the outlook for supplies later this year. Stocks of grains at the end of May are estimated to be slightly larger than a year earlier, but relative to the record production in 1942 the size of these stocks is small, reflecting a high rate of feed consumption.

So far this year, the total production of livestock products has been materially larger than during the corresponding period in 1942, and prospects are that production in the remainder of this year will exceed that of the corresponding period last year. Federally inspected slaughter of beef, veal, lamb, and mutton in the first quarter of 1943 was lower than in the corresponding period last year. However, this reduction was more than offset by the increase in pork production -- 16 percent above last year. Total egg production for the first quarter of 1943 was 16 percent larger than in the corresponding period last year and in April was 12 percent larger than in April 1942. Hatchery production of chicks in the first 4 months of 1943 was 13 percent larger than in the corresponding period of 1942, indicating a larger production of poultry in the next few months. Total milk production in the first quarter of 1943 was about 1 percent larger than in the same period last year but, as a result of unfavorable weather, the production in April was 1 percent below last year.

The present level of livestock production cannot be maintained, at least not beyond 1943, unless extraordinarily good yields of feed grains are obtained. If crop prospects are not improved in the next few months the consumption of feed grains in 1943 might exceed production, and feed shortages will result in 1944 unless the rate of feeding is reduced or the output of some classes of livestock is curtailed.

The May 1 crop report indicates that crop prospects declined during April in most parts of the United States and were much less promising than in the same period last year. However, it is too early as yet to predict precisely the total output of food for 1943, as the weather in the next 2 months may significantly alter the situation.

According to the May report, prospects for winter wheat declined in most areas and the indications were that the crop will be below average and 27 percent less than the 1942 crop. The indicated production of rye is lower than in 1942 and slightly below the 1932-41 average. The indicated production of oats in the Southern States is larger than last year but still below average.

Commercial production of early vegetables this season is running about 13 percent below last year. As a result of winter and spring freezes the combined production of soft deciduous fruits (apricots, cherries, peaches, plums, and prunes) is expected to be materially smaller in 1943 than last year. Peach production is expected to decline to a low level. In the 10 early Southern States it may be only half as large as in 1942. The production of citrus fruits (most of which has already been harvested) is of record size.

The outlook for farm labor, equipment, and supplies continues to improve. If present labor programs are fully realized, farm production in 1943 may not suffer from lack of labor as much as had been feared earlier. The situation for farm machinery and supplies this year has also recently shown improvement. The War Production Board has authorized an increase in farm machinery production to 40 percent of the 1940 level and in repair part production to 160 percent of the average production in 1940 and 1941. The increased production of repair parts is expected to be large enough to meet the demand. The War Food Administration has also recommended increases in the production of combines, corn pickers, and other machinery beyond the 40 percent limitation. The amount of fertilizers available for 1943 will exceed the amounts used in either 1941 or 1942; and the total plant food content of mixed fertilizers is higher although containing somewhat different proportions of the various ingredients. The total tag-sales during the first 4 months of 1943 were 11 percent higher than in the corresponding months of either 1941 or 1942. It is estimated that fertilizer requirements for essential war crops will be met completely. The quantity available for other crops may equal 75 percent of normal requirements.

On May 10, the Office of Price Administration launched a program designed to carry out the President's "hold-the-line" order by issuing a series of dollars-and-cents community ceiling prices for a number of foods sold by small retail stores in 127 principal cities and industrial areas. It is expected that within 2 months the Office of Price Administration will increase the number of cities and the number of commodities included in this program. Another important step to stabilize the cost of living now under consideration is the reduction in retail prices of meats, butter, and coffee, amounting to approximately 10 percent of the present prices.

-- May 25, 1943

STOCKS ON APRIL 1, 1943

Stocks of dairy products (milk equivalent) on April 1 were about 60 percent above the 1935-39 average but only half as large as stocks on the same date in 1942. Stocks of creamery butter were about 60 percent smaller than in 1942. However, as a result of rationing and the Government set-aside order, the into-storage movement of butter during April was the largest on record. Cheese stocks, though below the record stocks in 1942, were about average. With 70 percent of the cheese being set aside for Government purchase, cheese stocks will be accumulated fairly rapidly. Stocks of condensed and evaporated milk were considerably lower than last year but very large when compared with the average. Most of these stocks, however, are Government holdings.

Stocks of shell eggs on April 1 were 80 percent larger than on the corresponding date last year. Holdings on May 1 were 34 percent larger than a year earlier but the net into-storage movement for the past several weeks has been considerably smaller than in the corresponding period of 1942. Food Distribution Order 40 as amended, provides that by June 15, 1943, all commercially-owned shell eggs in storage must either be earmarked for drying or sold to the Government, except that each firm can maintain a working inventory for each place of business of 98 percent of the total quantities of shell eggs handled between June 1 and August 31, 1942. A substantial part of the shell eggs in storage on May 1 were earmarked for drying later in the year.

Stocks of frozen eggs on May 1 were 8 percent larger than a year earlier and a heavy into-storage movement has continued. The increase in frozen egg production this year is practically all for use in drying later in the year since Food Distribution Order 41 provides that production of liquid and frozen eggs and egg products by firms for purposes other than drying or for Government account in 1943 may be no larger than the quantities produced for purposes other than drying in 1942.

Rough estimates indicate that potato stocks on April 1 were 30 percent lower than in the same period in 1942, reflecting an exceptionally large movement of potatoes into consumption from January through March. (See page 12.)

Wheat stocks on April 1 were estimated at 901 million bushels, 91 million bushels larger than last year's record stocks and about three times as large as the 1935-39 average for the same period. With a crop smaller than last year in prospect and with an expected record wheat disappearance, these stocks may be reduced below 300 million bushels by July 1, 1944. (See page 12.)

Stocks of both corn and oats on April 1 were estimated to be somewhat larger than last year and 79 and 32 percent, respectively, larger than the 1935-39 average for the same period. However, with a record number of animals on farms and with a smaller prospective 1943-44 crop, stocks of corn and oats are expected to fall below the 1935-39 average in the fall of 1944. (See page 15.)

Stocks on April 1 and May 1, average 1935-39, 1942, and 1943

Commodity	Unit	Average 1935-39		1942		1943	
		Apr. 1	May 1	Apr. 1	May 1	Apr. 1	May 1
		Mil. units	Mil. units	Mil. units	Mil. units	Mil. units	Mil. units
Meats:							
Beef	Lb.	82	66	148	127	98	93
Pork	"	580	561	590	573	591	522
Lamb and mutton	"	4	3	8	7	13	12
Total	"	666	630	746	707	702	627
Poultry and eggs:							
Eggs 1/	Doz.	78	175	140	267	176	324
Chickens	Lb.	65	48	92	60	38	21
Turkeys	"	22	18	46	35	19	12
Dairy products:							
Total dairy products (milk equivalent)	"	1,461	1,454	4,216	4,548	2,313	2/
Butter, creamery	"	22	22	45	37	17	30
Cheese	"	76	71	190	208	78	80
Evaporated and condensed milk	"	98	121	594	738	486	2/
Dried milk	"	2	2	8	7	13	2/
Dried skim milk for human consumption 3/	"	20	22	36	43	64	2/
Lard, including rendered pork fat	"	130	129	182	126	128	148
Fruits:							
Apples	Bu.	9.7	4.6	8.2	3.5	9.4	4.6
Pears	"	.2	.1	.2	---	.3	.1
Fruits, frozen	Lb.	70.6	61.5	120.0	101.8	124.4	98.8
Vegetables, frozen	"	4/ 27.9	3/ 25.3	61.8	53.4	70.5	62.1
Potatoes	Bu.	2/	2/	33	14	23	9
Grains:							
Wheat	"	309	2/	810	2/	901	2/
Corn	"	816	2/	1,408	2/	1,458	2/
Oats	"	389	2/	438	2/	514	2/

1/ Shell and frozen eggs -- shell egg equivalent (excludes stocks of dried eggs).
2/ Not reported.
3/ Stocks on April 1, 1943 include Government holdings. No estimates of Government stocks for April 1, 1942 are available.
4/ Average for 3 years, 1937-39.

COMMODITY REVIEWS

Meat

Production of meat under Federal inspection for the first quarter of 1943 totaled about 5 percent larger than a year earlier but was close to 50 percent larger than the 1935-39 average for the period. As shown in the accompanying table, veal production was materially smaller than in 1942. However, this reduction, together with smaller decreases for beef, lamb, and mutton, was more than offset by the increase in pork production. The number of hogs slaughtered under Federal inspection during January-March was only 4 percent greater than a year earlier, but the average weight of hogs slaughtered was materially heavier than last year and the yield of pork per hog was unusually large.

Pork and lard yields per hog tend to vary inversely, reflecting changes in the amount of fat left on the lean cuts of pork and variations in the proportion of the heavy fat cuts (fat backs, etc.) rendered out as lard. Recently both of these factors have tended to increase pork production at the expense of lard. This is indicated by the 3 percent smaller lard production compared with the 16 percent larger pork production this year than last. Large lend-lease requirements for the fat cuts of pork appear to have been a significant factor in reducing lard yields.

Meat and lard production under Federal inspection, 1942, 1943 and average 1935-39 for the period January-March

Classification	1943	1942	Average 1935-39	Percentage 1943 is of 1942	Percentage 1943 is of Average 1935-39
	Million pounds	Million pounds	Million pounds	Percent	Percent
Beef	1,441	1,527	1,126	94.4	128.0
Veal	106	137	138	77.4	76.8
Lamb and mutton	199	204	175	97.5	113.7
Pork	2,135	1,840	1,188	116.0	179.7
All meat	3,881	3,708	2,627	104.7	147.7
Lard and rendered pork fat	452	464	249	97.4	181.5

On May 15, the War Food Administration and the Office of Price Administration established a War Meat Board to facilitate the handling of the Nation's meat supply. Considerations which led to the establishment of the Board are as follows: (1) Wide decentralization of the industry adds greatly to the complexities of adequate Government controls, (2) there is a wide variation both by seasons and areas in the movement of livestock to market and there is a wide variation in demand by seasons and by areas, (3) meat is perishable and must be moved into consumption quickly, necessitating a flexible and active administrative control, (4) substitution of wartime regulations for normal market influences has brought a number of problems such as black markets, price squeezes on slaughterers, difficulty in procuring requirements of the armed forces and lend-lease, and maldistribution of civilian supplies. All of these difficulties, War Food Administration authorities explained, are traceable to the lack of balance between demand and supply.

The Board will operate in Chicago and will be composed of nine members chosen from the War Food Administration, the Office of Price Administration, the Army, and the trade.

Quarterly and yearly requirements for meat by the armed forces, lend-lease, and civilians will continue to be determined by the allocation authorities in Washington. The War Meat Board will take steps to make the allocation and distribution of the national meat supply effective by taking into account the total quantity of meat available from day to day and by closely coordinating Government meat controls through direct cooperation of Government agencies and the livestock and meat industry.

Poultry and Eggs

Egg production in the United States has passed the peak for this year and will decline until the seasonal low point is reached in November. However, because of the much larger number of layers on farms, it is likely that egg production will continue considerably larger than a year earlier through the summer and early fall. Although the number of chickens raised this year for flock replacement purposes probably will be from 10 to 15 percent larger than in 1942, the number of layers for the 1943-44 season will depend a great deal on the outcome of this year's feed crops. In recent weeks the egg-feed price relationship has been the most favorable on record. This favorable relationship has resulted in an unprecedented demand for baby chicks as well as lighter-than-usual culling of laying flocks by farmers and has encouraged farmers to feed their poultry as well as feed supplies will permit.

Egg production during April was 12 percent larger than a year earlier. Most of the increase went into current consumption since the net into-storage movement of all eggs and quantities used for drying and hatching were only slightly larger than last year. With storage of shell eggs limited largely to stocks for Government purchase (by Food Distribution Order 40, as amended), supplies of eggs for civilians next fall and winter will be considerably below current levels, though perhaps as large as a year earlier. However, relative to the prospective strong demand late this year, supplies of eggs will be short, particularly in deficit winter egg-producing areas.

Hatchery production is continuing at an unprecedented level, confirming previous indications that supplies of chicken in the second half of 1943 would be by far the largest on record. The War Food Administration has advised poultrymen not to make further expansion in commercial broiler raising facilities since the maximum number that can be raised with existing facilities is consistent with prospective feed supplies and the national chicken goal. Marketings of chickens will be heaviest from August through November. Turkey production probably will be larger this year than last and most of the birds will be marketed in November and December.

Dairy Products

Although total milk production during the first third of 1943 has been the largest on record and slightly above last year's level, consumption of fluid milk has been so large that the production of most manufactured dairy products other than butter and dried whole milk has been smaller than a year earlier. In the first quarter of 1943, decreases in production from a year earlier were 21 percent for cheese, 30 percent for evaporated milk, and 20 percent for dried skim milk for human consumption. Increases in production were 3 percent for creamery butter and 153 percent for dried whole milk. Nevertheless, with the seasonal increase in production, supplies of most dairy products other than dried milk are sufficient to meet current demand.

Effective May 1, the War Food Administration increased the percentage of creamery butter to be held for Government purchase from 30 to 50 percent and of Cheddar cheese from 50 to 70 percent. The new percentages will apply during May, June, and July. As production declines seasonally, it is expected that the percentages to be set aside will be decreased sharply, so that most of the butter and a large proportion of the Cheddar cheese during the seasonally low production period this fall and winter will be available for civilian use exclusively. Storage stocks of butter have been increasing gradually since about the first of March and stocks of both butter and cheese probably will increase rapidly under the revised set-aside orders as production continues to advance.

Sufficient stocks of butter and cheese are expected to be accumulated during the current into-storage season to maintain civilian consumption at the present level through 1943. Current consumption of evaporated and fluid milk is at a high level and probably will be smaller in the fourth quarter of 1943, after the period of peak production. Civilian ice cream consumption under the limitation order, is expected to follow the same general seasonal pattern in 1943 as in 1942. Total civilian per capita consumption of dairy products in 1943 will be about 10 percent below last year's record high level on a butterfat basis but on a nonfat solids basis may be slightly higher than in 1942.

Amendment 21 to Ration Order 16, effective May 11, authorized regional Office of Price Administration directors to reduce point values of some grades of farm butter where slow movement during the flush milk production season threatens waste or spoilage. Farm butter usually is produced in relatively small quantities and is sold locally. It is not of uniform quality and is considerably more perishable than commercially produced butter. Hence it normally sells for less than creamery butter, particularly during the summer months when the supply is plentiful. Most of the farm butter is produced in the Southern States. In 1943 farm butter may make up about 18 percent of the total production of butter.

Food Fats and Oils

Supplies of food fats and oils in retail stores appear adequate to meet demands under rationing in practically all areas. Stocks of finished fats and oils for food use are fairly ample in all channels of distribution. Dealers accumulated some stocks in the week preceding rationing, when retail sales were stopped. Further accumulation of stocks was made in the first 2 weeks of April, when dealers were permitted to purchase supplies without turning in ration points.

Factory and warehouse stocks of animal and vegetable fats and oils, however, are comparatively small. On March 31, factory and warehouse stocks of butter, lard, edible beef fats and oils, corn oil, cottonseed oil, edible olive oil, peanut oil, sesame oil, and soybean oil totaled 900 million pounds, 140 million pounds less than a year earlier and about 350 million pounds less than 2 years ago. Stocks usually decrease during the second and third quarters of the year with a seasonal decline in output of vegetable oils.

Factory production of edible fats and oils, including creamery butter and federally inspected lard, totaled nearly 1,750 million pounds in the first quarter this year, which is 200 million pounds above a year earlier. Production is expected to continue above 1942 levels throughout 1943, but military and lend-lease requirements are considerably larger than a year ago.

Fruits

The total supply of "soft" deciduous fruits (apricots, cherries, peaches, plums, and prunes) is expected to be materially smaller in 1943 than last year. This smaller production is chiefly the result of severe winter and spring freezes, and of unfavorable weather in California -- particularly during the pollination period of some fruits. Peach production in the 10 early Southern States is forecast at 9.1 million bushels, less than one-half last year's crop in that area. The New England peach crop is expected to be a near failure. In California, apricot and cherry crop prospects (based on May 1 condition reports) are far less favorable than a year ago. Peach and plum prospects are less favorable than last year while prospects for pears, grapes, and prunes are somewhat more favorable.

Record citrus crops are being harvested this season. The grapefruit crop, estimated at 48.7 million boxes on May 1, is 20 percent larger than the crop of last season and is the largest crop on record. Combined orange and tangerine production, estimated at 83.9 million boxes and 4.4 million boxes, respectively, also is at a record level and about 5 percent larger than last season's production. The limited data available on apple crop prospects for 1943 indicate that at least an average-sized crop is probable.

A smaller "soft" deciduous fruit production in 1943 than in 1942 will result in reduced processed packs of these fruits and in smaller quantities for the fresh market. Most of the reduction in peach supplies is expected to occur in those areas producing primarily for the fresh market. Consequently, the effect of the light peach crop will be felt most keenly in that market. However, the 1943 canned peach pack also is expected to be reduced materially below that of 1942. Dried peach production probably will be smaller than last year, but the curtailment of the canning of freestone peaches in California should assist in securing a moderate-sized dried peach pack. The expected small 1943 apricot crop probably will result in a dried apricot pack far smaller than in 1942 and also may result in less apricots for canning and for fresh market use. Smaller supplies of plums and cherries probably would result primarily in reduced supplies of these fruits for fresh use. Increased quantities of grapes are expected to be used for raisins this year, thus tending to offset any increase in total grape production in so far as the fresh market is concerned.

The total quantity of fruits available for fresh consumption in 1943 is not likely to be as large as that in 1942. Citrus fruit for fresh use is expected to be somewhat larger this year than last. However, the supply of "soft" deciduous fruits for fresh consumption may be only about three-fourths that of 1942.

On May 18, the War Food Administration issued an order (F.D.O. 22.4) reducing the quantity of canned fruits and fruit juices that canners must set aside from the 1943 production for Government requirements. This order calls for 7 million less cases than the quantity previously established. The reductions primarily affect fruit cocktail, sweet cherries, peaches, pineapple, and pineapple juice. Despite the smaller Government reservations, total supplies of canned fruits and fruit juices for civilian consumption during the 1943-44 pack year probably will be about three-fourths of the supply available during the 1942-43 season.

Vegetables

Production of early vegetables this season is running about 13 percent below last year. Frosts and generally poor growing weather have delayed the growing season.

During the next few weeks, commercial supplies of the following truck crops will continue to be smaller than the relatively large supplies of last season: Onions, cabbage, cantaloups, celery, cucumbers, eggplant, and watermelons. However, supplies of three major vegetables -- carrots, snap beans, and green peas -- are expected to be larger than last year, particularly the second-early carrot crop now coming to market from California and Arizona. This crop is estimated at 5.9 million bushels, about 80 percent above the production of last season. Moreover, supplies of greens and other early vegetables from noncommercial areas and home gardens soon will supplement commercial vegetable supplies.

Recent intentions-to-plant reports indicate that growers of major processing crops plan for a larger acreage than last season. Intended acreage of snap beans for processing is 19 percent larger than the planted acreage last year, tomatoes for processing 2.4 percent larger, sweet corn for processing 5 percent larger, and green peas for processing 6 percent larger. Plantings of cucumbers for pickles is expected to be 13 percent smaller than last year, and spinach in California and Texas almost 25 percent smaller. Beet acreage for processing is indicated at 6 percent above last year, while intended acreage of lima beans for processing is about the same as last season.

A reduction in the quantities of canned vegetables that canners must set aside from 1943 production to meet Government requirements was announced on May 18 by the War Food Administration (F.D.O. 22.4). The reduction amounts to about 23 million cases and applies mainly to the corn, peas, spinach, tomatoes, and snap bean packs.

Wheat and Rye

A winter wheat production of 515 million bushels was indicated by the Crop Reporting Board on the basis of May 1 conditions. Assuming a spring wheat acreage for harvest of 11.5 million acres, which allows for the 10-year average abandonment, and a yield equal to that of the post-drought years 1937-41, spring wheat production would approximate 170 million bushels. With a winter wheat crop of 515 million bushels, this would indicate a total wheat crop of about 685 million bushels compared with 981 million bushels in 1942.

Total wheat stocks on April 1 were estimated at 901 million bushels, which is 91 million bushels above a year earlier and 592 million bushels above the 1935-39 average. On the basis of the April-June disappearance in prospect, July 1 stocks are expected to total about 600 million bushels. Stocks of this size are almost as large as the record on July 1, 1942 of 632 million bushels. With a prospective 1943 crop much smaller than the expected disappearance, these large stocks may be reduced to below 300 million bushels by the end of the 1943-44 marketing year. This would provide for a "normal minimum" carry-over of about 125 million bushels besides reserves for small yields and war relief. It is expected that imports of wheat from Canada will supplement domestic supplies available for feeding.

As a result of a very large utilization of wheat for feed and commercial alcohol, the disappearance in 1943-44 is expected to be even larger than the billion bushel disappearance indicated for 1942-43.

A rye crop of 36.9 million bushels was indicated on the basis of May 1 conditions, which is much smaller than the near-record crop of last year of 57.3 million bushels. The 1935-39 average was 44.9 million bushels. Stocks of rye on July 1, 1943 may total about 45 million bushels, which is double the 22 million bushel carry-over last year and about three times the 1935-39 average. With a total supply in 1943-44 of about 82 million bushels and with an expected disappearance of 60 to 65 million bushels, stocks at the end of the year may be about average.

THE POTATO SHORTAGE

The supply of potatoes available for civilians in 1942-43 was estimated at 125 pounds per capita -- about 5 pounds less than the 1935-39 average. At the same time the demand for other foods greatly exceeded supplies. This condition, together with the increased purchasing power, set the stage for a sharp rise in the price of potatoes. In the early part of November, it was therefore considered necessary to place ceilings on the price of potatoes. Immediately thereafter prices at Western shipping points were at or very near the ceilings.

The total supply of potatoes from about September through the following April is relatively fixed except for the few potatoes which come to market from the early crops. The demand for potatoes at the established ceiling was large and expanding continuously.

Idaho was one of the first major shipping areas to run out of potatoes. Idaho potatoes were in demand in both the East and the West.

Production in the 37 intermediate and late States was estimated at 317.8 million bushels, 3 percent greater than in 1941. Sales from these States from the beginning of the season through January 1, 1943 were officially estimated at 127.9 million bushels, which is about 13 percent above the movement from the 1941 crop for the same period. The rapid movement of potatoes more than offset the larger production, leaving stocks of 101 million bushels on January 1, 1943 compared with 103 million bushels on January 1, 1942.

Potatoes: Estimated production and stocks of intermediate and late crop potatoes, 1941-42 and 1942-43

Production and stocks	1941-42	1942-43	1942-43 as percentage of 1941-42
	Million bushels	Million bushels	Percent
Production	308.4	317.8	103
Jan. 1 stocks	103.0	101.0	98
Apr. 1 stocks	33.0	23.0	70
May 1 stocks	14.5	9.0	62

Potatoes, intermediate and late crop: Comparison of estimated rates of movement into consumption, 1941-42 and 1942-43

Period	1941-42	1942-43	1942-43 as percentage of 1941-42
	Million bushels	Million bushels	Percent
To Jan. 1	112.8	127.9	113
Jan. 1 to Apr. 1	70.0	78.0	111
Apr. 1 to Mar. 1 1/ ...	18.5	14.0	76

1/ Maine stocks representing about one-third of merchantable stocks on April 15 were put under Government supervision.

Rough estimates indicate that rail shipments (on a bushel basis) for January, February, and March were about 37 percent above last year, while truck shipments during these months were only about 80 to 85 percent of last year. The over-all movement of potatoes (rail and truck) for the first quarter of 1943 was estimated to be about 10 to 15 percent larger than in the same period last year.

Total movement of potatoes into consumption from midsummer of 1942 to about April 1, 1943 was estimated to be about 13 percent above last year. This is equivalent to a rate of consumption of over 140 pounds per capita, which is 15 pounds per capita above the estimated supply available for civilians in 1942-43. Potato supplies thus dwindled rapidly and a "black market" developed. In addition to the outright evasion of the price control regulations, potato dealers utilized various loopholes in the law. Table stock potatoes were tagged as "seed potatoes," which were not subject to ceiling prices until mid-March. The seed-potato ceiling finally established provided for a differential of 75 cents a bag above the "table stock" ceiling and some dealers continued to label their potatoes as "seed potatoes." Many dealers, moreover, operating on large margins, were able to bypass the regular dealers and pay growers more than the regular dealer could. This made it difficult for the Army to get its supplies through regular channels.

In addition to this heavy civilian demand for potatoes, even at "black market" and "seed potato" prices, military requirements were large and were not being fully supplied. Moreover, growers were asked to increase potato acreage by at least 17 percent above last year which required an additional 8 to 10 million bushels of seed potatoes.

On April 14 the War Food Administration announced a program to control the remaining stocks of Maine potatoes (Maine stocks were estimated at that time to be about one-third of the total United States stocks for marketing). The program was designed to enable Government procurement agencies to obtain urgently needed supplies. With Government agencies more nearly meeting their most pressing needs and growers purchasing seed potatoes, civilian supplies in late April and early May were almost nonexistent in many cities.

The supply picture was further aggravated because winter and early spring potato crops from Florida and Texas were only about average and smaller than last year. Furthermore, early frosts and generally poor growing weather have delayed the growing season by about 2 weeks.

New-crop supplies are expected in volume after May 15 from the second group of early States (California, Alabama, Louisiana, and South Carolina). The crop is estimated at almost 25 million bushels, which is about 30 percent above last year. This does not mean, however, that the potato shortage is over. Consumers probably will want to buy at ceiling prices more potatoes than will be available.

It does not seem likely at this time that the total United States potato crop will exceed 400 million bushels. This crop may be augmented somewhat by larger potato production from home and Victory gardens. Total supplies, however, may not be sufficient to permit a rate of consumption as high as the level of the first quarter in 1943.

THE FEED OUTLOOK FOR 1943-44

With 1943 feed crops already planted and with the 1942-43 feeding season well along, attention can now be turned to the prospective feed supply for 1943-44. On this will largely depend the production of livestock and livestock products needed to meet food requirements for 1943-44.

So far the 1943 growing season has been less favorable than the early part of the 1942 season, but much will depend on the weather during the next few months. Assuming the remainder of the 1943 growing season will be about average, the outlook for the feed situation for the coming year is as follows:

(1) A 10 percent smaller supply, accompanied by a stronger demand for feed, is in prospect for 1943-44; (2) greater use will have to be made of supplementary roughages than in other recent years; (3) much more

efficient use will have to be made of feed grains and byproduct feeds than in 1942-43; (4) livestock (especially hogs) may not be fed to such heavy weights as in 1942-43; (5) a reduction in the output of some classes of livestock appears likely, and (6) reserve stocks of feed grains will be reduced to, if not below, safe working levels during the 1943-44 season.

Prospective Carry-Over of Feed Grains Into 1943-44

The rapid disappearance of feed grains during the past 6 months and stocks remaining April 1 indicate that the carry-over of all feed grains into 1943-44 probably will be no larger than at the beginning of the 1942-43 marketing year. This means that the equivalent of the extremely large corn crop of 3,175 million bushels harvested last fall, together with the favorable crop of oats, barley, and grain sorghums harvested in the summer of 1942, as well as 275 million to 300 million bushels of wheat, will be fed to livestock during the feeding year extending from the fall of 1942 to the fall of 1943. Stocks of corn carried over next October 1 are not expected to be any larger than the carry-over of 492 million bushels a year earlier. Should disappearance continue as heavy during the remainder of the marketing year as during the first 6 months, the carry-over will be somewhat below that of a year ago.

The carry-over of oats July 1 probably will approximate 225 million bushels, 30 million bushels larger than in 1942. The carry-over of barley on June 1 may total around 100 million bushels, about 20 million bushels larger than a year ago.

Feed-Grain Supplies for 1943-44 May be Down 10 Percent

With average yields and expected carry-over of feed grains, the 1943-44 supply will be at the level indicated in the accompanying table. Because of the smaller 1943 wheat crop in prospect and the increase in the utilization of wheat in alcohol, there may be less wheat available for feed in 1943-44 than in the current marketing year, even after allowing for larger imports of feed wheat from Canada. This will be partly made up by the prospective larger supplies of rye for feeding. Including these two grains, the feed-grain supply for 1943-44 is expected to be about 10 percent smaller than for 1942-43. With below-average yields, feed supplies would be reduced further.

Total supplies of byproduct feeds that will be available for livestock feed in 1943-44 may be a little greater than in 1942-43. If present plans for use of granular wheat for alcohol are carried out, about a million tons more wheat millfeeds will be produced. With an average growing season, a larger production of oilcake and meal is in prospect, but this would be about offset by increased use of soybean meal for food. The combined supplies of animal-protein feeds and miscellaneous proteins may be about the same next year as this.

Feed: Estimated supply and disposition, 1942-43 and 1943-44

Year and item	Supply: Carry-in	Supply: Production	Supply: Supply	Disposition: Livestock feed	Disposition: Other uses	Disposition: Carry-out
	Million bushels	Million bushels	Million bushels	Million bushels	Million bushels	Million bushels
Six grains						
1942-43 1/						
Corn	492	3,175	3,667	2,932	285	450
Oats	194	1,369 2/	1,593	1,233	135	225
Barley	81	426 2/	527	308	119	100
Grain sorghums		107	107	107	---	---
Wheat (fed)			304	304	---	---
Rye (fed)			24	24	---	---
1943-44 3/						
Corn	450	2,850	3,300	2,850	275	175
Oats	225	1,180 2/	1,445	1,160	135	150
Barley	100	357 2/	477	312	115	50
Grain sorghums		105	105	105	---	---
Wheat (for feed)			251	250	---	---
Rye (for feed)			55	55	---	---
	Million tons	Million tons	Million tons	Million tons	Million tons	Million tons
Feed grains and byproduct feed						
1942-43						
Six grains	18.8	124.0	153.6	122.0	13.0	18.6
Byproduct feed 4/			16.5	16.1	---	---
Total			170.1	138.1	---	---
1943-44 3/						
Six grains	18.6	110.2	139.0	117.8	12.6	8.6
Byproduct feed 4/			17.7	16.7	---	---
Total			156.7	134.5	---	---

1/ Preliminary.

2/ Includes rough allowance for imports.

3/ Expected supplies and disappearance in 1943-44. Prospective 1943 production based on farmers intentions to plant and average yields in recent years, published in the "Prospective Plantings" report of March 19, 1943.

4/ Oilcake and meal, tankage, meat scraps, fish meal, milk products, dry weight equivalent of skim milk and whey fed on farms, gluten feed and meal, distillers' and brewers' dried grains, rice millfeeds, and beet and molasses pulp.

Feed Requirements in 1943-44

There has been a sharp increase in livestock production during the past 2 years. Further increases during 1943-44 will depend largely on feed supplies. Increased amounts of feed will be required to feed out the spring and fall pig crops and to attain the egg and poultry production now in prospect for 1943-44. Only extremely high yields in 1943, however, will give feed supplies large enough to permit further increases in total livestock production in 1943-44 without cutting into the reserve supplies of feed at the close of the marketing year.

Livestock numbers now on hand or in prospect are at a record high. The number of milk cows and heifers 2 years old and older kept for milk on January 1, 1943 was 2 percent larger than on January 1, 1942, and about equal to the earlier record of 26.9 million head on January 1, 1934. The total number of all cattle was 4 percent greater than the record number on hand January 1, 1942 and 5 percent over the earlier record of 74.4 million head on January 1, 1934.

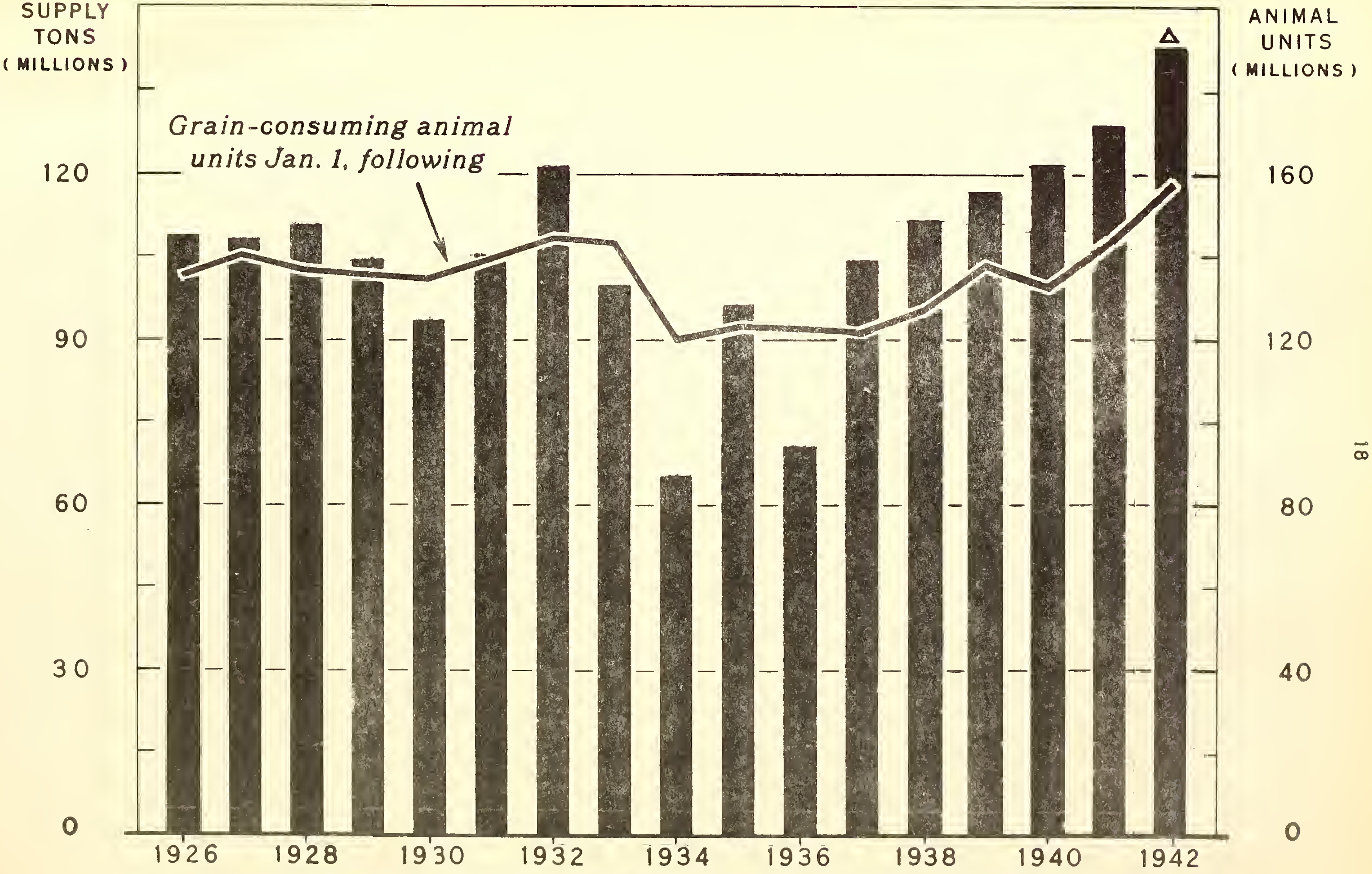
The increase in hogs and poultry is greater than for cattle. The number of all chickens on hand on January 1, 1943 was about 14 percent above January 1, 1942 and the same percentage above the earlier record of January 1, 1928. Hog numbers on hand January 1, 1943 were 22 percent greater than on January 1, 1942. Assuming that farmers carry out their reported intentions for spring farrowing and meet the goals for farrowing in the fall of 1943, it is estimated that the 1943 pig crop may well total 125 million head, compared with the pig crop of 105 million head in 1942 and an average pig crop of less than 69 million in the 5 years 1935-39. At the same time, hog weights are currently running about 10 percent over normal, while egg production per hen is about 12 percent and milk production per cow about 8 percent above the average for 1935-39. The increase in units or numbers of grain-consuming livestock for the calendar year 1943 is expected to be 10 to 12 percent over 1942.

Altogether, the requirements of livestock in 1943-44 will be about as large or a little larger than in the current feeding season if present expansion in livestock production is continued. Prices of livestock products and feeds in 1943-44 may be expected to be at the maximum levels permitted by price ceilings. This probably will mean that feeding ratios will be a little less favorable for producers, on the average, than during the current year. Less favorable feeding ratios will tend to reduce the rate of feeding per animal on farms. However, with a larger number of livestock, the total disappearance of feed grains and other feeds next year may be expected to be about as large as supplies of feeds will permit, after allowing for minimum carry-overs at the close of the 1943-44 marketing year.

Smaller Carry-Over in Prospect for 1944

Unless feed-grain production is much larger in 1943 than now appears probable, the greater part of the reserve stock of corn and other feed grains that has been accumulated in recent years probably will be utilized during 1943-44. Feed-grain stocks carried over into 1944-45 may be reduced to about the average prior to the ever-normal granary, or to about 175 million bushels for corn, 160 million for oats, and 50 million for barley.

FEED GRAIN SUPPLIES* AND LIVESTOCK NUMBERS, UNITED STATES, 1926-42



* SUPPLY OF CORN OCTOBER 1, OATS JULY 1, AND BARLEY JUNE 1, PLUS PRODUCTION OF GRAIN SORGHUMS

Δ PRELIMINARY

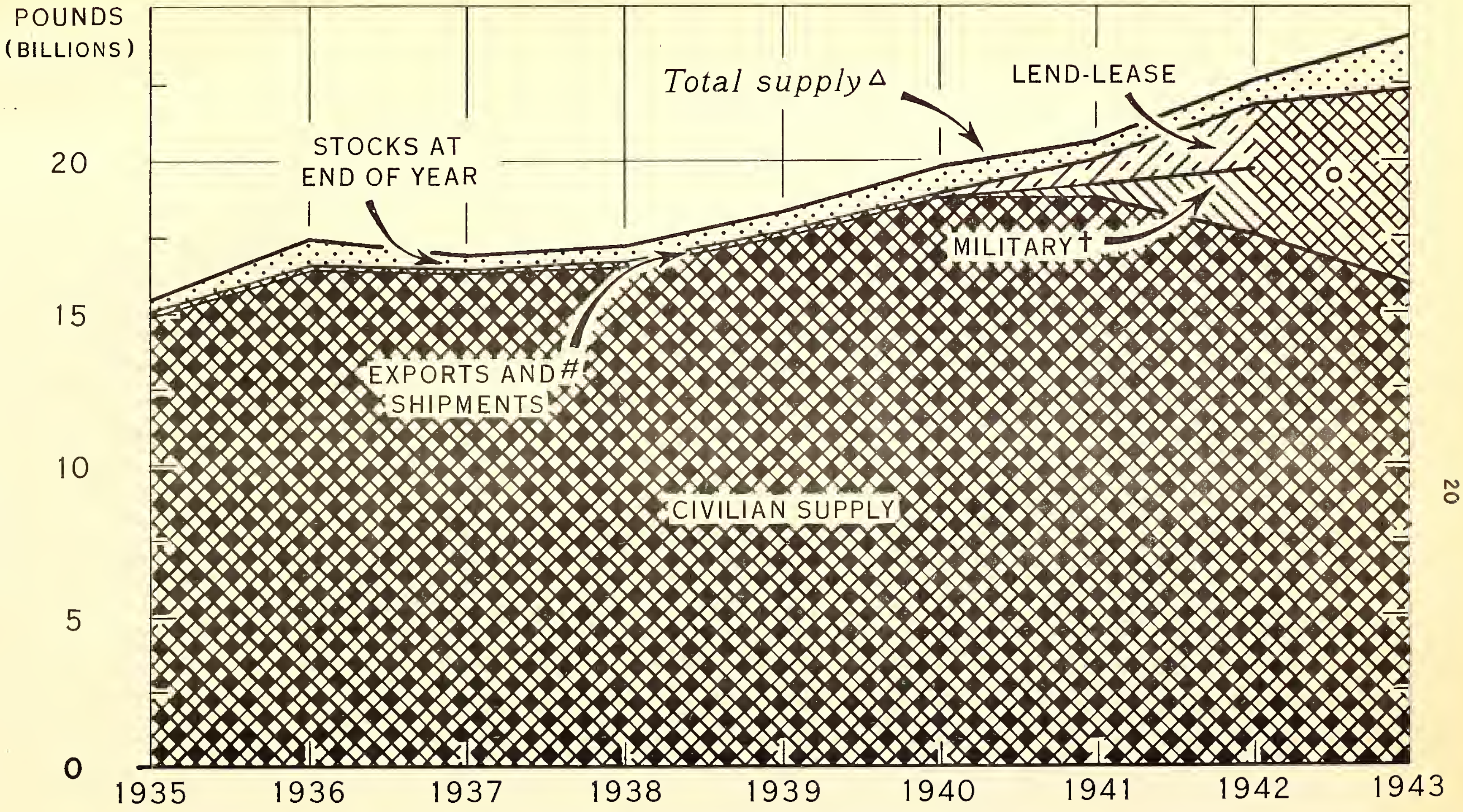
U. S. DEPARTMENT OF AGRICULTURE NEG. 43022 BUREAU OF AGRICULTURAL ECONOMICS

FIGURE 1

SUPPLY AND DISPOSITION OF MAJOR FOOD ITEMS, 1935-43

The accompanying charts (see also cover page) show the total supply and disposition of major food items for the years 1935 to 1943 inclusive. For the years 1941-43 the charts indicate the portion of our total supply that was allocated to our military forces and lend-lease. On the whole it appears that, with the exception of a few commodities, the amount of the total supply going to military and lend-lease has been and is being compensated for by the continuously increasing supply resulting from record production in the past few years and an expected production in 1943 as large or larger than last year. The amount going to lend-lease, moreover, would in normal times be absorbed to some extent by regular exports, which have been curtailed since the war, and the amount that goes to the military forces is largely compensated for by a reduction in the civilian population. On a per capita basis, therefore, the civilian supply of most commodities in these years has not fallen below the pre-war period. Since the kind of food shortages that have been experienced in 1942 and 1943 were not prevalent in the pre-war period, the explanation for shortages and the necessity for rationing lies not alone in large military and lend-lease requirements. Other factors which are probably playing a more significant role in the tight food situation are: (1) increased purchasing power, resulting in an increased demand for food at ceiling prices; (2) heavier type of work done by a large section of the population in war factories, resulting in an increased demand for food; (3) abnormal concentration of people in defense areas and differentials in price ceilings, resulting in the dislocation of the normal channels of distribution; and (4) the operation of black markets and an increase in local sales and consumption, which likewise affect the normal food distribution.

MEATS (DRESSED WEIGHT): SUPPLY AND DISPOSITION, 1935-43*



*BEEF, VEAL, LAMB, MUTTON, AND PORK (EXCLUDING LARD)

△PRODUCTION, STOCKS AT BEGINNING OF YEAR, AND IMPORTS

#INCLUDED IN LEND-LEASE BEGINNING 1941

†MILITARY CONSUMPTION NOT SHOWN PRIOR TO 1941, AS IT IS NEGLIGIBLE COMPARED WITH CIVILIAN CONSUMPTION

O MILITARY AND LEND-LEASE COMBINED, 1943

DATA FOR 1943 ARE TENTATIVE INDICATIONS

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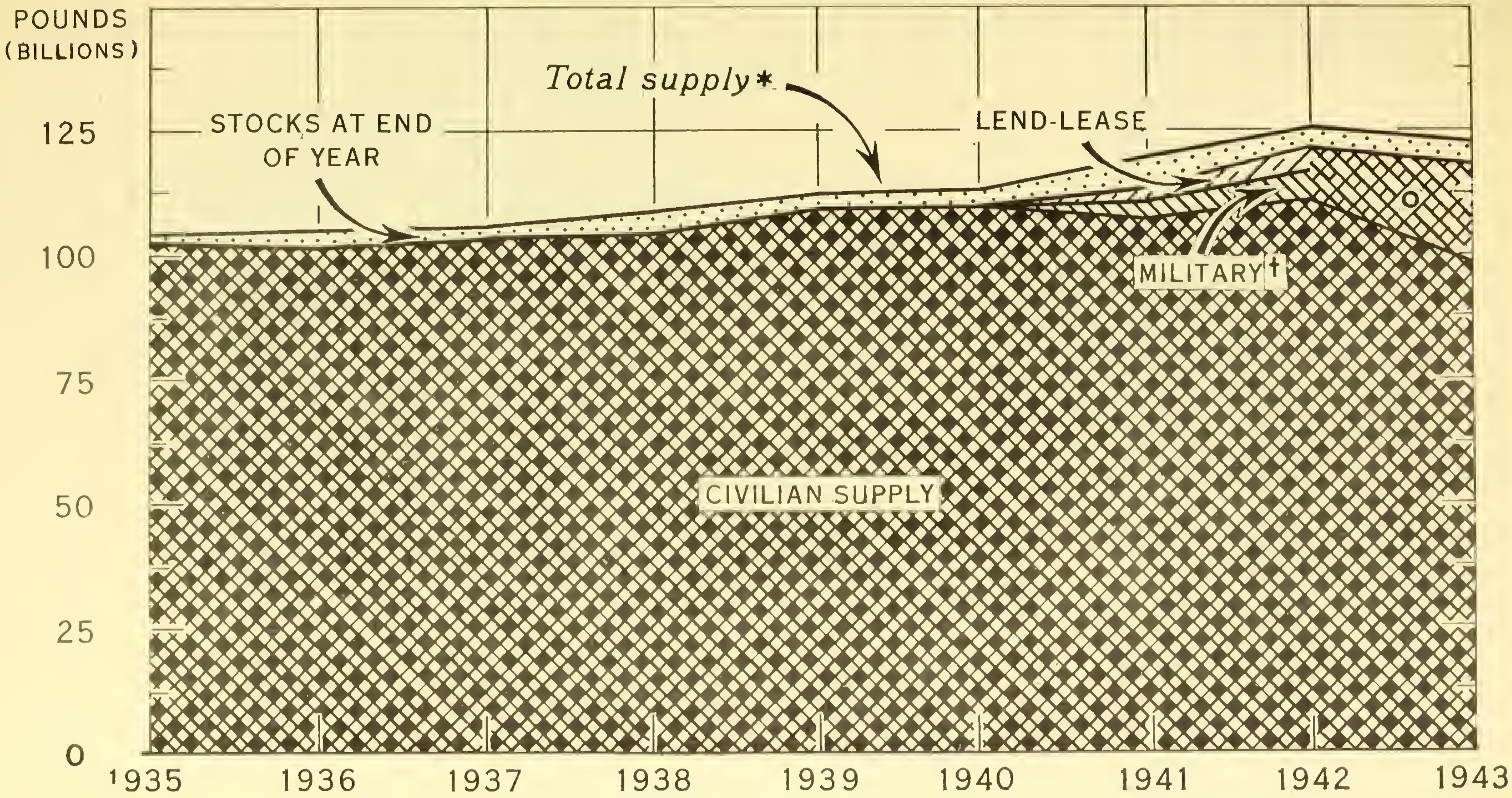
FIGURE 2

DAIRY PRODUCTS (MILK EQUIVALENT): SUPPLY AND DISPOSITION FOR HUMAN CONSUMPTION, 1935-43



* PRODUCTION, STOCKS AT BEGINNING OF YEAR, AND IMPORTS

† MILITARY CONSUMPTION NOT SHOWN PRIOR TO 1941, AS IT IS NEGLIGIBLE COMPARED WITH CIVILIAN CONSUMPTION

° MILITARY AND LEND-LEASE COMBINED, 1943

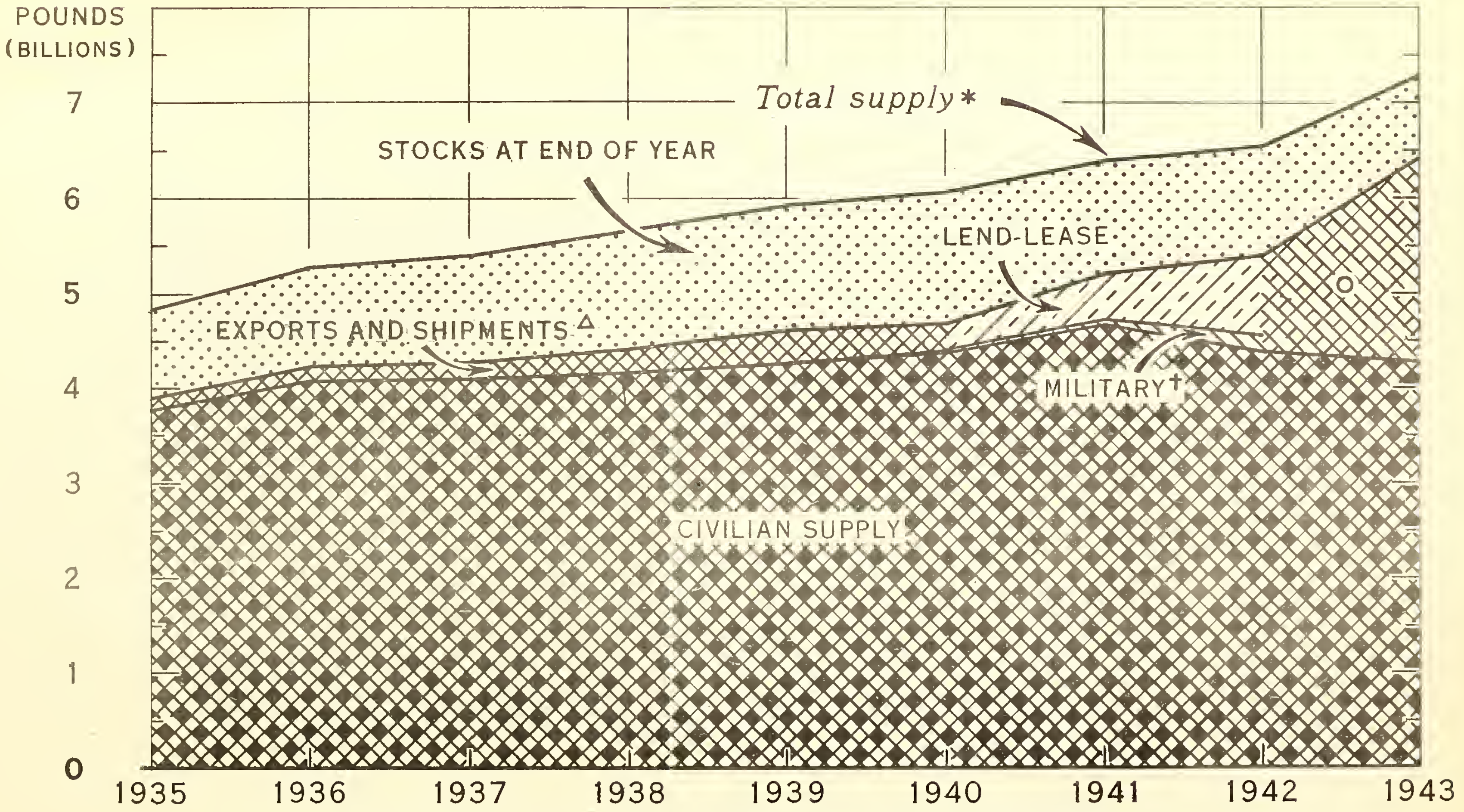
EXPORTS AND SHIPMENTS WERE LESS THAN 1 PERCENT OF TOTAL SUPPLY FOR YEARS 1935-40; INCLUDED IN LEND-LEASE BEGINNING 1941

DATA FOR 1943 ARE TENTATIVE INDICATIONS

U. S. DEPARTMENT OF AGRICULTURE NEG. 42993 BUREAU OF AGRICULTURAL ECONOMICS

FIGURE 3

FOOD FATS AND OILS EXCLUDING BUTTER (FAT CONTENT) SUPPLY AND DISPOSITION, 1935-43



* PRODUCTION, STOCKS AT BEGINNING OF YEAR, AND IMPORTS

△ INCLUDED IN LEND-LEASE BEGINNING 1941

† MILITARY CONSUMPTION NOT SHOWN PRIOR TO 1941, AS IT IS NEGLIGIBLE COMPARED WITH CIVILIAN CONSUMPTION

O MILITARY AND LEND-LEASE COMBINED, 1943

DATA FOR 1943 ARE TENTATIVE INDICATIONS

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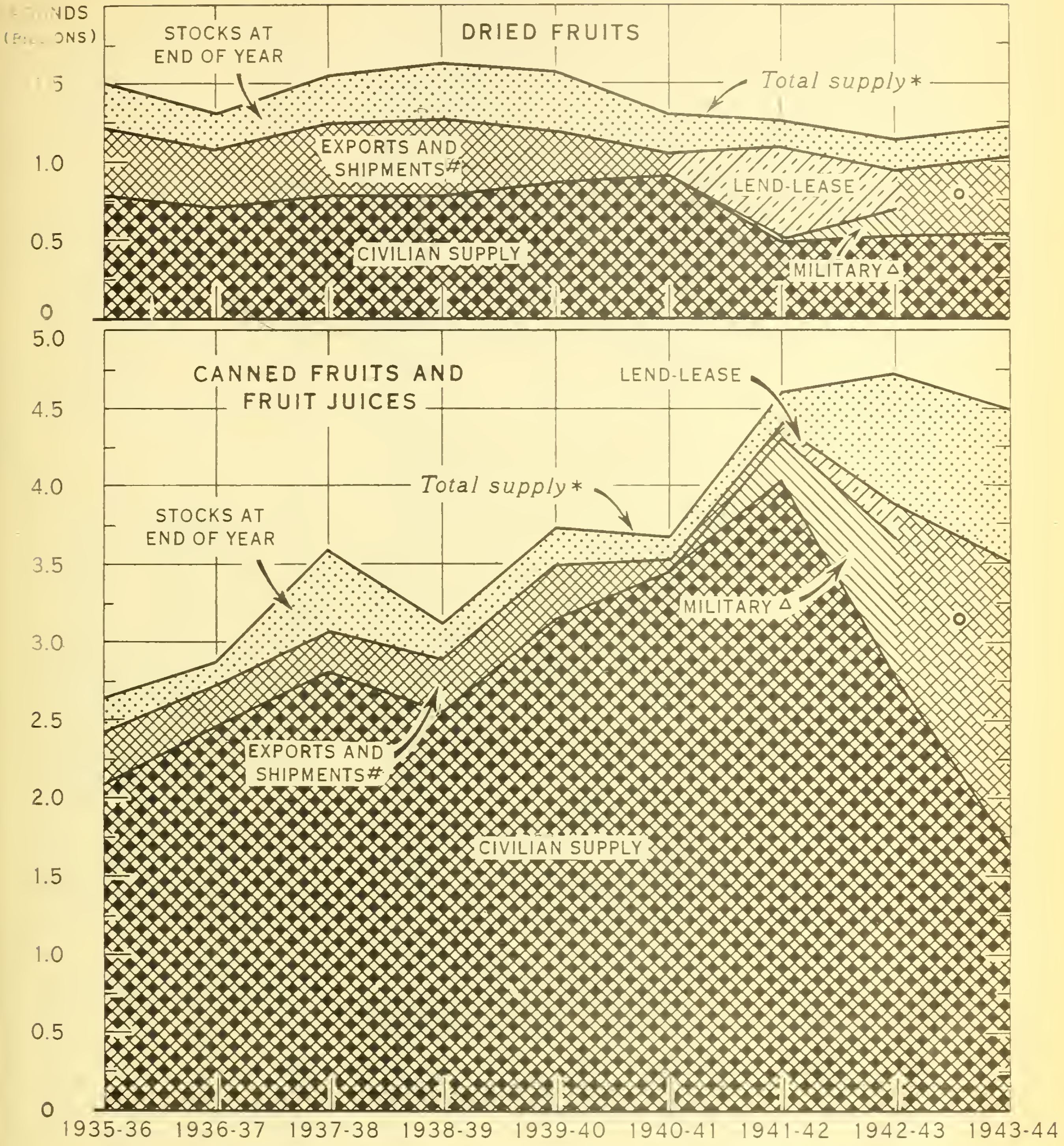
FIGURE 4

FRUITS, DRIED AND CANNED: SUPPLY AND DISPOSITION, 1935-43



** PRODUCTION, STOCKS AT BEGINNING OF YEAR, AND IMPORTS*

# INCLUDED IN LEND-LEASE BEGINNING 1941-42

△ MILITARY CONSUMPTION NOT SHOWN PRIOR TO 1941-42, AS IT IS NEGLIGIBLE COMPARED WITH CIVILIAN CONSUMPTION

O MILITARY AND LEND-LEASE COMBINED, 1943-44

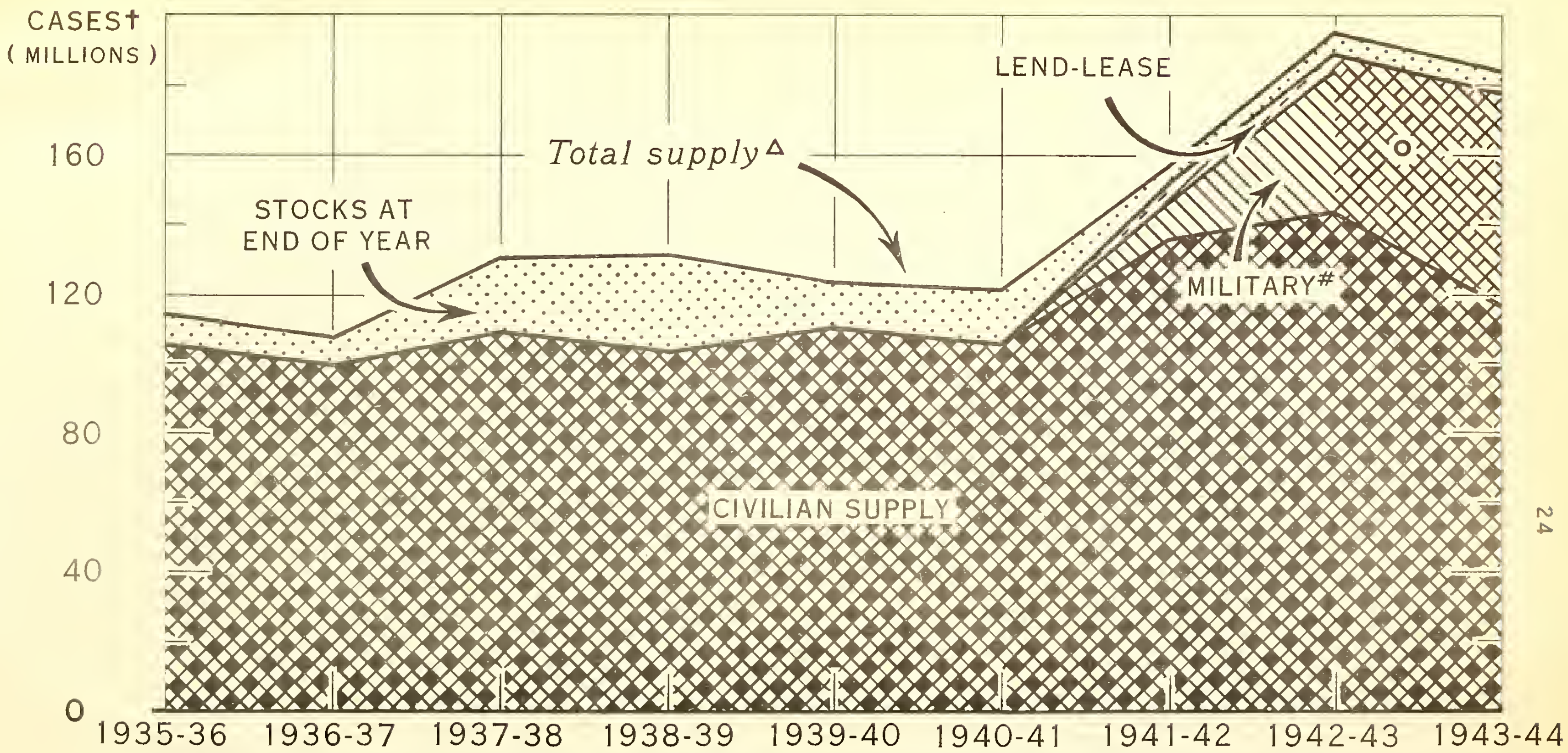
DATA FOR 1943 ARE TENTATIVE INDICATIONS

RTMENT OF AGRICULTURE NEG. 43000 BUREAU OF AGRICULTURAL ECONOMICS

FIGURE 5

FIGURE 6

CANNED VEGETABLES*: SUPPLY AND DISPOSITION, 1935-43



** DATA BASED ON 13 MAJOR VEGETABLES (ASPARAGUS, LIMA BEANS, SNAP BEANS, BEETS, CARROTS, CORN, PEAS, PIMIENTOS, PUMPKIN AND SQUASH, SPINACH, TOMATOES. TOMATO PUREE, AND TOMATO JUICE); NOT COMPARABLE WITH PREVIOUSLY PUBLISHED DATA ON TOTAL CANNED VEGETABLES*

† CASES OF 24 No. 2 CANS EACH

△ PRODUCTION, STOCKS AT BEGINNING OF YEAR, AND IMPORTS

# MILITARY CONSUMPTION NOT SHOWN PRIOR TO 1941-42, AS IT IS NEGLIGIBLE COMPARED WITH CIVILIAN CONSUMPTION

O MILITARY AND LEND-LEASE COMBINED, 1943-44

EXPORTS AND SHIPMENTS WERE NEGLIGIBLE FOR YEARS 1935-36–1940-41; INCLUDED IN CIVILIAN CONSUMPTION

DATA FOR 1943 ARE TENTATIVE INDICATIONS

U. S. DEPARTMENT OF AGRICULTURE NEG. 43006 BUREAU OF AGRICULTURAL ECONOMICS

RETAIL FOOD COSTS, MARCH 1943

Retail prices of all foods advanced 2.8 percent from mid-February to mid-March, according to the Bureau of Labor Statistics index. The March prices represent an increase of 11.5 percent over June 1942 and 15.9 percent over March 1942, or an average increase of 1.3 percent per month during the past year.

The greatest increases in prices are shown for the following fresh foods: Green beans, 41.3 percent; cabbage, 40.9 percent; sweetpotatoes, 36.6 percent; beets, 26.6 percent; potatoes, 18.4 percent; onions, 14.5 percent; apples, 12.7 percent; fish (fresh and frozen), 8.4 percent; and oranges, 5.9 percent. Prices of all other major food groups increased slightly except eggs, which decreased 1.2 percent. Sweetpotatoes, apples, and fish are still not subject to price control, and they are the only foods included in the Bureau of Labor Statistics index that are not covered by a maximum price regulation. Green beans and cabbage became subject to price control on February 23.

RETAIL PRICE CEILINGS ON FOODS, ANNOUNCED MARCH 21-MAY 14, 1943

On May 10, a major phase of the program to carry out the President's "hold-the-line" order was launched by the issuance of a series of dollars-and-cents community ceiling prices for a number of foods sold by small retail stores in 127 principal cities and industrial areas. The following foods were covered in these initial orders: Shortenings, coffee, frozen fish, cooking and salad oils, evaporated and condensed milk, flour, macaroni and noodle products, sugar, poultry, butter, eggs, fluid milk, and bread. On May 17, cents-per-can ceiling prices were issued for nine canned vegetables and canned fruits in every retail store in 130 metropolitan centers. It is expected that within 2 months the Office of Price Administration will increase the number of cities and the number of commodities included in this program. (OPA-T-867; OPA-2520)

Another important step in the attempt to stabilize the cost of living, as announced by the Price Administrator, is the contemplated reduction in retail prices of beef, veal, pork, lamb, mutton, coffee, and butter, amounting to approximately 10 percent of the present retail prices. (OPA-2466)

In addition, the following maximum price regulations have been issued since March 21:

Effective date	Foods	Ceiling prices
3-24-43	Frozen fish	Fixed margin over net cost (MPR 268, Am. 6). Formerly under GMPR.
3-26-43	Kosher poultry	10 cents for killing and 10 cents for plucking (MPR 268, Am. 5).
3-26-43	Poultry bought live, dressed, drawn, split, or cut-up; sold split or cut-up	Fixed margin over net cost (MPR 268, Am. 5). Formerly under GMPR.

Effective date	Foods	Ceiling prices
3-29-43	Honey	Fixed margin over net cost (MPR 238, Am. 13). Formerly under RMPR 256.
4-2-43	Butter	Fixed margin on retail sales by route-seller, creamery or manufacturer (MPR 289, Am. 11).
4-15-43	Fresh tomatoes, snap beans (green or wax), carrots, cabbage, peas, spinach, and lettuce	Fixed margin over net cost (MPR 268, Am. 8). Formerly under TMPR 28 and TMPR 29.
4-16-43	Pure maple sugar	Exempt from price control (RMPR 256, Am. 5).
4-20-43	Horsemeat	14-19 cents per lb. (MPR 367). Formerly under GMPR.
5-4-43	Panbread, in specified areas	8-1/2-12 cents per loaf; by chain stores private label, 7-1/2-10 cents (SR 14, Am. 167). Formerly under GMPR.
5-5-43	Dry onions, 1943 and later crops	Fixed margin over net cost (MPR 268, Am. 9). New regulation.
5-7-43	Horsemeat	Zone differentials established; price of ground horsemeat, bone in, reduced 2 cents per lb. (MPR 367, Am. 2).
5-10-43	Cabbage, onions, and quick-frozen poultry	Retailer's margin reduced (RMPR 268.)
5-10-43	Pickles and relishes	Retailer's margin increased (RMPR 238.)
5-10-43	Jams, jellies, and preserves	Fixed margin over net cost (RMPR 238). Formerly under RMPR 256.
5-17-43	Pork	Slight revisions in existing ceiling prices (MPR 336, Am. 4).
5-17-43	Beef, veal, lamb, and mutton	Cents-per-pound ceiling prices for specified cuts and grades (MPR 355, Am. 2). Formerly under GMPR.
5-17-43	Canned and frozen fruits, berries, and fruit juices (except citrus)	Fixed margin over net cost (RMPR 238, Am. 1). Formerly under RMPR 256.
5-17-43	Kosher cuts of beef veal, lamb, and mutton	Dollars-and-cents ceilings (MPR 394). Formerly under GMPR.

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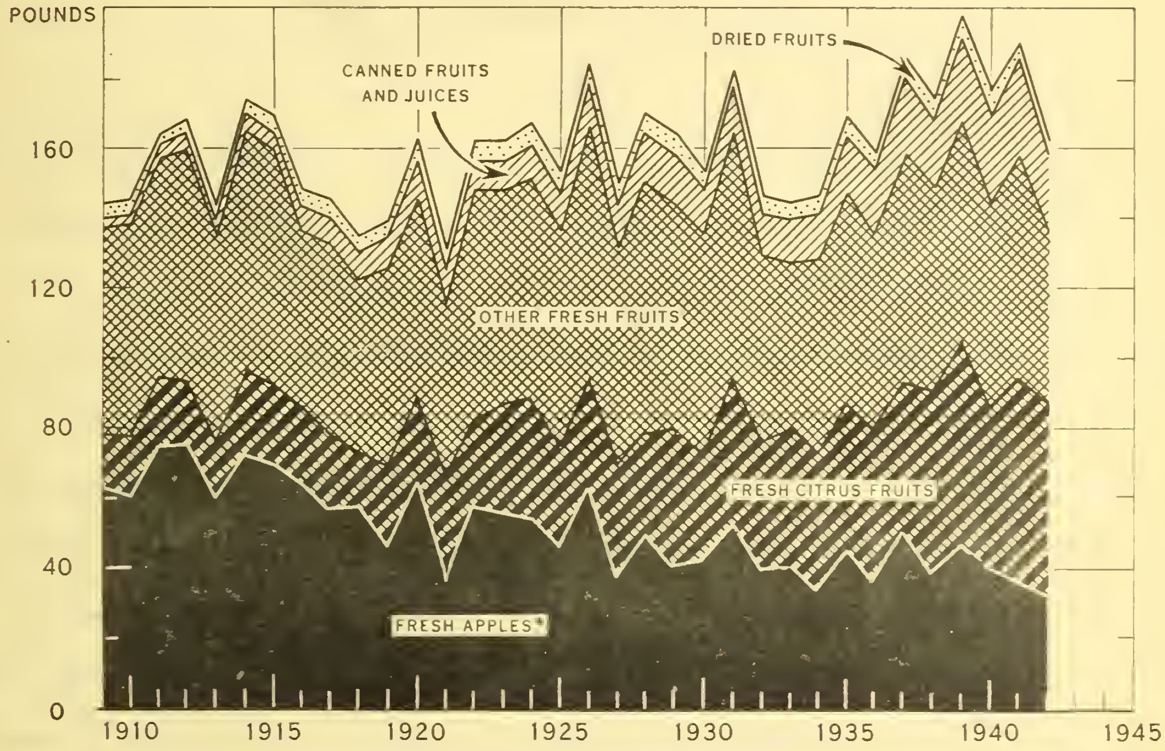
PER CAPITA CIVILIAN CONSUMPTION OF FRUITS, UNITED STATES, 1909-42



*1941 AND 1942, COMMERCIAL APPLES ONLY

U. S. DEPARTMENT OF AGRICULTURE NEG. 43132 BUREAU OF AGRICULTURAL ECONOMICS

While there has been a moderate upward trend in the per capita consumption of all fruits during the period 1909-42, significant changes have taken place in the composition of the total fruit consumption. The per capita consumption of fresh apples has been steadily declining but fresh citrus fruit consumption has continuously increased and more than doubled from the period 1910-14 to 1935-39. With the consumption of other fresh fruits remaining fairly constant, however, the consumption of all fresh fruits has shown no significant increase. The consumption of canned fruits and juices, on the other hand, has risen steadily. The per capita consumption of canned fruits more than tripled from 1910-14 to 1935-39. The consumption of canned fruit juices was not significant until 1932 but has since been increasing in importance.

THE NATIONAL FOOD SITUATION

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Summary

Total meat production in 1943 is expected to exceed the record 1942 output. Supplies for civilians, however, will continue smaller than last year. Federally inspected slaughter of hogs, sheep, and lamb, in May was the largest on record for that month, but cattle slaughter under Federal inspection during May was 3 percent less than in April, and 13 percent less than in May last year. Effective June 14, all livestock slaughterers operating under Federal inspection are required to set aside 45 percent of their production of steer and heifer beef meeting Army specifications. This quantity of beef is equivalent to a little less than 30 percent of the production under Federal inspection and roughly 20 percent of the total beef production from all slaughter.

Supplies of poultry for consumers will continue to increase until the seasonal peak is reached late this fall; and in most of the remainder of 1943 they will exceed the record supplies in corresponding months last year. Egg production in the United States during May was 13 percent larger than in May 1942. Total supplies of shell eggs for civilians this summer and coming fall probably will be as large as a year earlier though seasonally smaller than supplies of recent months. For the nation as a whole the strong consumer demand will exceed the supply at ceiling prices.

On the basis of present allocations of dairy products to civilians for the remainder of 1943, the per capita consumption for the year as a whole may be 3 percent above 1942 for fluid milk and cream, but 15 percent below for butter and dried milk, 20 percent for condensed and evaporated milk, and 25 percent for cheese. Total milk production in May was 2 percent below a year earlier. With the continued large consumption of fluid milk, production of most manufactured dairy products during the first half of 1943 was considerably below a year earlier. Production in the last half of 1943 may be only slightly smaller than a year earlier since there was a sharp drop in the production of cheese and evaporated milk in mid-1942. The accumulated stocks of butter and cheese probably will be sufficient to maintain the present rate of consumption during the winter low production months.

Stocks of food fats and oils both at the retail and wholesale level appear to be adequate to meet the demand under rationing in practically all areas.

The June 1 crop report indicates that the production of deciduous fruits is likely to be 10 percent smaller than in 1942. However, citrus production for the 1942-43 marketing season is setting an all-time record and production from the 1943 bloom is also expected to be large provided conditions remain favorable. As a result, the total fruit production in 1943-44 may be only about 5 percent smaller than during the 1942-43 season. Citrus supplies for civilians may be as large in 1943-44 as in 1942-43 and apple supplies almost as large, but the supply of all other deciduous fruits for fresh use may be only two-thirds to three-fourths as large.

It is probable that the total supply of all canned fruits and fruit juices for civilian consumption in the 1943-44 season will be no more than three-fourths of the supply last season. In contrast to the indicated smaller supplies of fresh and canned fruits, dried fruit production in 1943 probably will exceed that of 1942. The supply of commercial vegetables for the fresh market so far this season is estimated to be about 13 percent smaller than in 1942, partly the result of abnormally cool temperatures and excessive rainfall. However growers have indicated their intentions to plant a larger acreage of the major processing truck crops in 1943 than was planted in 1942.

The domestic wheat supply for the 1943-44 year is now indicated at about 1,320 million bushels compared with 1,613 million bushels in 1942-43. The June 1 condition of the wheat crop indicates a probable output of 731 million bushels compared with 981 million bushels in 1942. The domestic rye supply for the 1943-44 year is now indicated at about 75 million bushels, consisting of an estimated 41 million bushel carry-over and a crop estimated at 34 million bushels on the basis of June 1 condition. This would be the second largest rye supply since 1922. Prospects on June 1 were not so favorable for feed crops as on that date in 1942, but recently weather conditions have been more favorable. With average growing conditions during the remainder of the season, the 1943-44 supply of feed grains, including wheat and rye available for feed, probably would total about 135 million tons, 11 percent smaller than the 1942-43 supply, but 31 percent larger than the 1935-39 average. The number of grain-consuming animal units next January 1 is expected to be 5 to 10 percent greater than on January 1, 1943, and about 35 percent above the 1936-40 average. The 1943-44 supply of feed per grain-consuming animal unit probably will be smaller than in any of the past 5 years.

Reductions in retail ceiling prices for meats, amounting on the average to about 3 cents per pound, were announced by the Office of Price Administration. The reduction became effective in late June. The resulting reduction in slaughterers processing margins are to be made up by subsidy payments. A 10 percent roll-back in retail and wholesale butter prices was recently put into effect by the Office of Price Administration. The roll-back at the retail level became effective on June 10. Subsidies of 5 cents per pound at the creamery level will be paid by the Government.

-- June 25, 1943

COMMODITY REVIEWS

Meat

In the first half of 1943, commercial production of meats has not differed greatly from that of a year earlier; increased production of pork has about offset reductions in beef and veal. Prospects for the last half of the year are encouraging. Slaughter of hogs, particularly in the fall and early winter, should exceed materially last year's July-December total, and there are some indications that cattle marketings also will be stepped up considerably. Although information on the volume of farm and local slaughter is not currently available, the indications are that meat production in these categories is running above last year. Hence, total meat production for 1943 is expected to exceed the record 1942 output. Supplies available for civilians, however, will continue smaller than last year.

The number of cattle slaughtered under Federal inspection during May was 3 percent less than in April and 13 percent less than in May 1942. Slaughter for the 5-month period January-May was 9 percent less than in the corresponding period last year. May calf slaughter was 30 percent less than a year earlier, while the January-May total was 23 percent smaller than in the first 5 months of 1942.

The weekly rate of hog marketings has increased sharply since April. The number of hogs slaughtered under Federal inspection during May was 20 percent more than in April and 24 percent more than in May last year. It was the largest inspected slaughter on record for the month. Slaughter supplies now consist chiefly of hogs from the 1942 fall pig crop, which was estimated to have been 23 percent larger than the fall crop of 1941. Inspected sheep and lamb slaughter during May was 11 percent more than in April and 10 percent more than in May last year. It was the largest inspected slaughter for the month on record. A large part of the increase over a year earlier occurred in the West Coast where restrictions on civilian deliveries of lamb and mutton have been eased in order to help relieve the meat shortage in that area. This has resulted in a smaller than usual number of spring lambs reaching Midwestern and Eastern markets by mid-June.

Reduction in the retail ceiling prices for meats amounting on the average to about 3 cents per pound, effective in late June and early July, were announced June 6 by the Office of Price Administration. These reductions (equivalent to about 2 cents per pound on dressed carcasses) are not intended to be reflected in reduced livestock prices to producers. The resulting reductions in slaughterers' processing margins are to be made up by subsidy payments amounting to 1.1 cents per pound for cattle and calves, 1.3 cents per pound for hogs, and 0.95 cent per pound for sheep and lambs. Concerns which slaughter 4,000 pounds or more a month in any one establishment are eligible for the subsidy payment. Ceiling prices on all fresh and frozen meats were reduced at the packer level on June 14, at the wholesale level on June 19, and at the retail level on June 21. Reductions in the ceilings on cured and processed meats at the slaughter level begin on June 28 and at the wholesale and retail levels on July 6.

Because Government procurement agencies have been unable to purchase adequate supplies of beef to meet their urgent requirements, all livestock slaughterers operating under Federal inspection are required, effective June 14, to set aside 45 percent of all the steer and heifer beef they produce which meets Army specifications. This quantity of beef required by the armed forces is equivalent to a little less than 30 percent of the production under Federal inspection and roughly 20 percent of the total beef production from all slaughter.

As a direct means of implementing the war meat program at the country level, the War Food Administration recently has set up State and area meat marketing supervisors and County War Meat Committees. The function of these supervisors and committees will be largely to assist in the administration of food distribution orders applying to livestock slaughter and meat distribution at country points and to disseminate information regarding the meat program.

Effective June 12 packers cold storage holdings of beef and pork for civilian delivery are now limited to one-third their average weekly civilian quotas of beef and four times their average weekly civilian quotas of pork. Storage holdings of pork ordinarily are much larger in relation to production than beef. This is because a large proportion of the pork stocks are in process of cure, whereas practically all beef is sold fresh. The maximum inventories allowed under this amendment are in line with the working stocks needed for the permitted volume of civilian deliveries. In limiting meat inventories to these levels, it is expected that meat produced in excess of civilian delivery quotas will be made readily available for purchase by Government procurement agencies.

Poultry and Eggs

Substantial increases in poultry marketings have taken place during the past month as some young chickens reached marketable age and fowl were culled from laying flocks in larger numbers. Supplies of poultry for consumers will continue to increase until the seasonal peak is reached late this fall and in most of the remainder of 1943 will exceed the record quantities of a year earlier. Laying flocks in May were 14 percent larger than in May 1942, and on June 1 the number of young chickens on farms was 15 percent larger than a year earlier.

The War Food Administration has advised poultrymen not to make further expansion in broiler-raising facilities. The slaughter goal for chickens of 4 billion pounds (dressed weight), however, remains unchanged. The demand for baby chicks is continuing at a level unprecedented for the summer season and is in line with the output needed to reach the chicken goal.

Egg production in the United States during May was 13 percent larger than in May last year. Despite the limitation on protein content of laying mashes and the rather unfavorable weather the rate of production per bird in May was reduced only about 1 percent from the record set in May last year.

F.D.O. 40 restricting the storage of shell eggs (see the National Food Situation, April 1943) was amended in early June to permit eggs placed in storage prior to March 25 to be retained in storage after June 15. The War Food Administration purchased about 88,284 cases in carrying out the provisions of this food order. Stocks of shell eggs in the United States on June 1 totaled 8.3 million cases. Total supplies of shell eggs for civilians this summer and coming fall probably will be as large as a year earlier though seasonally smaller than supplies of recent months. For the nation as a whole the strong consumer demand will exceed the supply at ceiling prices. Retail price ceilings for eggs advance seasonally from June to November.

Dairy Products

Total milk production in May was 2 percent below last year. With the continued large consumption of fluid milk, production of most manufactured products has been considerably below a year earlier. However, the seasonal increase in production and the Government set-aside orders have resulted in a fairly rapid accumulation of stocks of butter and cheese. The Government is buying a large share of its requirements of these two products now during the peak of production so that most of the production this winter can go to civilians.

Rationing of dairy products was extended in May to include condensed and evaporated milk, and soft perishable cheeses. Rationing of canned milk, effective June 2, is intended to conserve limited supplies for infant feeding and for persons unable to obtain fresh milk. This is expected to reduce the civilian consumption in the third quarter of 1943 to about 60 percent of the consumption in the second quarter. Rationing of cream cheese and other soft types of cheese will tend to prevent the diversion of milk into a heavier-than-normal manufacture of these hitherto unrationed foods from the manufacture of other essential dairy products. Consumption in 1943 will be held at about 75 percent of last year's level. Cottage cheese containing 5 percent or less of butterfat will continue to be unrationed. In 1942 cottage cheese made up 14 percent of total cheese consumption.

The Government issued an order in May requiring manufacturers of both spray and roller dried skim milk to set aside 75 percent of their production for Government purchase. Although production of dried skim milk for human consumption may be 70 percent higher in 1943 than in 1942 only the most essential civilian, lend-lease, and military requirements will be met. Civilian consumption of dried milk may be reduced 60 percent between the second and third quarters of 1943.

A 10 percent rollback in retail and wholesale butter prices was recently put into effect by the Office of Price Administration. The roll-back became effective at the retail level on June 10. Earlier effective dates were set at the creamery and wholesale level to minimize the financial loss due to changes in inventory value. The Reconstruction Finance Corporation subsidy of 5 cents per pound at the creamery level will apply to butter manufactured after June 1.

On the basis of present allocations to civilians for the remainder of 1943, the per capita consumption for the year as a whole may be 3 percent above 1942 for fluid milk and cream, but 15 percent below for butter and dried milk, 20 percent below for condensed and evaporated milk, and 25 percent below for cheese. Total milk solids used in ice cream will be down 35 percent but due to changes in the formulas, consumption on a pound basis may be down only 20 percent. Total consumption of milk fat may be almost 10 percent below last year but consumption of all non-fat milk solids may be up slightly. The latter include protein, calcium, and riboflavin.

Fats and Oils

Domestic disappearance of the principal food fats (creamery butter, oleomargarine, federally inspected lard, and shortening) was 6 percent larger in the first 3 months this year than last, but in April, the first full month of consumer rationing, was 2 percent below a year earlier. Disappearance of oleomargarine, which was 67 percent above last year in January-March, was only 19 percent higher in April. Disappearance of lard in the first quarter of 1943 was 4 percent larger than a year earlier but was 28 percent smaller in April 1943 than in April 1942. The decline in lard consumption was partly offset by an increase in consumption of shortening.

Supplies of oleomargarine and shortening, particularly of the less well-known brands, have been reported backing up in retail and wholesale channels. This has been attributed in some quarters to the use of a higher proportion of the meats-and-fats ration points for meats than had been anticipated when point values were set. Another explanation is that manufacturers' quotas (under F.D.O. 42) are set at a higher level than the consumer allocations upon which point rationing was based. Presumably manufacturers will reduce their operations to conform with the rate of consumer purchases once dealers are adequately stocked with finished fats.

Fruits

Total deciduous fruit production in 1943 (based on June 1 conditions) is likely to be about 10 percent smaller than in 1942. A summary of the indicated 1943 crops of some major deciduous fruits is shown in the accompanying table.

Fruits: Indicated production, 1943, with comparisons

Item	Unit	Indicated 1943	Percentage of 1942 crop	Percentage of 1932-41 average crop
			Percent	Percent
Peaches	Bu.	45,267,000	68	82
Pears	Bu.	24,299,000	79	87
Apricots (3 states) 1/	Tons	112,600	49	48
Cherries, all, (12 states) 2/	Tons	166,640	85	111
Cherries, sweet	Tons	76,350	84	-
Cherries, sour	Tons	90,290	86	-
Plums (Calif.)	Tons	65,000	90	102
Prunes for drying (Calif.)	Tons	191,000	112	98

1/ California, Washington, and Utah.
2/ New York, Pa., Ohio, Mich., Wis., Mont., Idaho, Colo., Utah, Wash., Oregon, and Calif.

Peach production is expected to be smaller in all major producing areas of the United States. In the Western States the crop is estimated at 11 percent below that of 1942. Production in the 10 early Southern States and in the North Atlantic States, however, is expected to be only 34 percent and 28 percent, respectively, of last year's production in these areas. Indicated pear production in 1943, likewise, is considerably smaller than that of last season in all major areas. The important Pacific Coast States' pear crop is estimated at only 9 percent below last year's, but crops in most other areas -- particularly in the South Atlantic States -- are likely to be very short.

Sweet cherry production in 1943, compared with last year, is expected to be larger in the Pacific Northwest but smaller in the Eastern and Central States and in California. The Michigan, Ohio, Pennsylvania, and Washington sour cherry crops probably will be considerably smaller than last season's. Prospects are slightly less favorable for commercial apple production than a year ago, but more favorable for grape production, particularly for the raisin grape crop in California.

Citrus production for the 1942-43 marketing season is setting an all-time record. The orange crop is estimated to be 2 percent larger than last season, the tangerine crop 105 percent, the grapefruit crop 22 percent, and the lemon crop 19 percent. Citrus production from the 1943 bloom (production to be marketed in the fall of 1943 and in 1944) also is expected to be large, providing conditions remain favorable. Total fruit production in 1943-44, therefore, may be only about 5 percent smaller than during the 1942-43 season in spite of the expected 10 percent reduction in deciduous fruits.

Fruit crops in 1943 will be shortest in those areas producing primarily for the fresh market. A part of this reduction in fresh supplies probably will be offset by relatively larger shipments of fresh fruits from the fruit processing areas. The total citrus supply for civilians may be as large in 1943-44 as in 1942-43; but the supply of fresh deciduous fruits for civilians will be considerably smaller. The total fresh fruit supply for civilians in 1943-44 probably will not exceed 85 to 90 percent of that consumed during the 1942-43 season.

The total canned pack of deciduous fruits in 1943 probably will not exceed three-fourths the pack of 1942. Deciduous fruits normally constitute more than one-half of all canned fruits and fruit juices. It is probable that the total supply of canned fruits and fruit juices available for civilian consumption in the 1943-44 season will be no more than three-fourths the supply of last season. In contrast to the indicated smaller supplies of fresh and canned fruits, dried fruit production in 1943 probably will exceed that of 1942. Smaller packs of dried apricots and peaches are expected to be more than offset by increased production of prunes and raisins. It seems probable that the 1943-44 supply of dried fruits for civilians will be at least as large as in 1942-43.

Vegetables

The supply of commercial vegetables for the fresh market so far this season is estimated to be about 13 percent smaller than in 1942 partly the result of abnormally cool temperatures and excessive rainfall. Crops in many areas are being harvested as much as 3 weeks later than usual. The total supply of fresh vegetables marketed during the next few weeks probably will be considerably smaller than during the same period last year. Snap beans and carrots are expected to continue in larger supply than a year ago. Late asparagus, beets, cabbage, corn, spinach, and tomatoes probably will be on the market in about the same quantities during the next 4 to 6 weeks as in the corresponding period of 1942. Other vegetables -- particularly celery, cucumbers, onions, and melons -- will be less plentiful than last year. Vegetables from victory gardens can be expected to add considerably to commercial vegetable supplies during the next few weeks.

Growers have indicated their intentions to plant a larger acreage of the major processing truck crops in 1943 than was planted in 1942. The intended 1943 acreage compared with the planted 1942 acreage is 2 percent larger for tomatoes, 19 percent larger for snap beans, 5 percent larger for sweet corn, 6 percent larger for beets, and 13 percent smaller for cucumbers. The planted acreage of peas for processing is estimated to be 6 percent larger than last season. Frequent rains have prevented many growers in the North Atlantic and North Central States from planting peas, snap beans, corn, and tomato crops at the usual time. This may result in acreages somewhat smaller than the intended acreages. It also may result in reduced production as good yields are less likely when planting is late.

Relatively heavy shipments of potatoes from California and smaller shipments from Florida, Louisiana, South Carolina, and Texas, ("early (2)" crop) can be expected to continue during the last half of June. The potato crop from this area this season is now estimated to be 28 percent larger than it was last season. The crops being harvested in North Carolina, Virginia, Kansas, Tennessee, Maryland, and Missouri (the major "second early" and "intermediate" producing States) are expected to total about one-third larger than in 1942. Although supplies of new potatoes during the next few weeks are expected to be relatively large, it is probable that demand will continue to absorb the available supply at ceiling price levels.

Wheat and Rye

The domestic wheat supply for the 1943-44 marketing year is now indicated at about 1,320 million bushels compared with 1,613 million bushels in 1942-43. The June 1 condition of the wheat crop indicates a probable output of 731 million bushels and available data as to the utilization and supply of old wheat points to a carry-over on July 1, 1943 of about 590 million bushels. This estimate of stocks is based on a 1942-43 total disappearance of about 1 billion bushels, which would be the largest on record. The large disappearance reflects a large quantity used for feed, a moderately large quantity for alcohol, and a substantial increase in the amount for food. Disappearance in 1943-44 is expected to be about 100 million bushels larger. With total supplies of 1,320 million bushels, a disappearance of this size would reduce the carry-over July 1, 1944 to about 250 million bushels. This would provide for working stocks of 125 million bushels besides a reserve for small yields and post-war relief. It is expected that imports will supplement domestic supplies available for feeding.

The domestic rye supply for the 1943-44 marketing year is now indicated at about 75 million bushels, consisting of an estimated 41 million bushel carry-over and a crop estimated at 34 million bushels on the basis of June 1 condition. This would be the second largest rye supply since 1922. The supply last year totaled 88 million bushels (highest since 1922 when the crop was 101 million bushels), and the 5-year average (1935-39) was 59 million bushels. Apparent disappearance of rye in 1942-43 was 47 million bushels and the 5-year average disappearance was 42 million bushels. In 1942-43 the total disappearance of rye was utilized approximately as follows: Food, 10 million bushels; feed, 27 million; seed, 8 million; and distilled spirits and alcohol, 2 million. With the prospective feed grain supply short relative to livestock numbers, it is expected that rye disappearance will be much larger in 1943-44 than in 1942-43. While the total rye supplies are large, the new crop in prospect, estimated at 34 million bushels, is 41 percent below the very large crop of 57 million bushels in 1942 and 12 percent below the 10-year (1932-41) average of 38.6 million bushels, which includes 3 years of very low rye production (1933, 1934, and 1936).

The Feed Outlook

Feed crop prospects on June 1 were not so favorable as on that date in 1942; and 1943 yields of corn, oats, and barley are expected to be somewhat below the very high yields of last year. The 1943-44 barley supply, including indicated production and June 1 carry-over, is estimated to be 475 million bushels, 6 percent smaller than last year. The oats supply, including expected carry-over July 1, probably will be about 10 percent smaller. The

1943-44 corn supply also is expected to be somewhat smaller than the 1942-43 supply, but much will depend on the weather during the next few months. Weather conditions recently have been more favorable.

With average growing conditions during the remainder of the season, the 1943-44 supply of feed grains, including wheat and rye available for feed, probably would total about 135 million tons, 12 percent smaller than the 1942-43 supply, but 31 percent larger than the 1935-39 average. The number of grain-consuming animal units next January 1 is expected to be 5 to 10 percent greater than on January 1, 1943, and about 35 percent above the 1936-40 average. The 1943-44 supply of feed per grain-consuming animal unit probably will be smaller than in any of the past 5 years.

Marketings of corn have been small in recent weeks, reflecting the tendency of Corn Belt farmers to hold corn for feeding. This has restricted the quantity of corn available for making processed corn products, including foods. Receipts at primary markets have averaged a little less than 3 million bushels weekly in recent weeks. This is inadequate to meet the requirements of corn processors, which total about 20 to 25 million bushels monthly. From the middle of May to the middle of June commercial stocks of corn were reduced from 31 million bushels to 14 million bushels.

Practically all of the 225 million bushels of wheat authorized for sale by Congress for feeding during 1942-43 had been sold late in May, making it necessary to discontinue further sales. The sale of an additional 50 million bushels of wheat during June has been authorized.

RETAIL FOOD COSTS, MID-MARCH TO MID-MAY 1943

Retail prices of all foods combined advanced 4.1 percent from mid-March to mid-May, according to the Bureau of Labor Statistics index of retail food costs in large cities. The May prices represent an increase of 16.1 percent over June 1942, and 17.6 percent over May 1942, or an average increase of 1.5 percent per month during the past year.

As in the preceding month, the greatest increases in prices occurred in fresh fruits and vegetables. These increases are partly seasonal, although the prices in March were already at a high level. The following fruits and vegetables showed increases from March to May 1943, as indicated. Price changes from March to May in 1942 and for the 5-year period 1934-38 are shown for comparison, and in addition the changes from May 1942 to May 1943.

Food	Percentage change			
	March - May			May 1942-May 1943
	1943	1942	1934-38	
Sweetpotatoes ...	+84.5	+ 8.0	+11.3	+231.5
Apples	+44.9	+21.0	+ 9.4	+ 72.0
Potatoes	+32.9	+ 9.9	+ 7.7	+ 74.2
Cabbage	+23.7	+ 9.8	+ 8.1	+155.6
Onions	+21.1	-10.5	+ 8.6	+ 26.5
Lettuce	+16.2	- 6.1	+ 7.0	+ 79.3
Grapefruit	+14.7	+31.2	1/	+ 23.8
Bananas	+ 9.3	+22.4	- 3.6	- 2.5
Oranges	+ 7.1	+ 8.7	+ 6.8	+ 34.4

The following vegetables showed substantial price decreases since March, although they are well above the May 1942 level.

Food	Percentage change			
	March - May			May 1942-May 1943
	1943	1942	1934-38	
Green beans	-34.8	-37.1	-17.6	+29.9
Carrots	-10.9	0	+ 3.1	+24.2
Spinach	-10.1	+ 4.3	-13.9	+58.9

There were no significant changes in prices of the other major food groups from March to May 1943.

Fresh sweetpotatoes, apples, and fish are still the only foods included in the Bureau of Labor Statistics index that are not subject to price control. However, since we are approaching the new season for sweetpotatoes and apples, the shipments of these items are small.

1/ Not available.

SUPPLY AND DISPOSITION OF MAJOR FOOD COMMODITIES 1935-40

With the war food situation becoming more important daily, the interest in as well as the need for pre-war food consumption data has greatly increased. While war food requirements may be measured in terms of nutritional needs or in terms of what consumers would be willing to buy at the prevailing prices, an equally significant yardstick is the food consumption of the Nation prior to the War. The accompanying tables give data on total supply and disposition of the major food items for the period 1935-40. Data for 1941, 1942, and preliminary data for 1943 (though not as complete as those given below since export and import figures cannot be published for these 3 years) will be found in the April and the forthcoming July issue of the National Food Situation.

Supply and disposition of major food commodities, 1935-40 1/

Meats (dressed weight)

Year	Supply				Disposition			
	Production	Stocks beginning of period	Imports	Total supply	Exports and shipments	Stocks end of period	Apparent consumption	
							Total	Per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
				Beef and veal				
1935	7,565	141	201	7,907	53	106	7,748	60.8
1936	8,433	106	227	8,766	54	194	8,518	66.3
1937	7,906	194	227	8,327	51	61	8,215	63.6
1938	7,902	61	200	8,163	53	58	8,052	62.1
1939	8,002	58	220	8,280	52	77	8,151	62.3
1940	8,160	77	168	8,405	55	107	8,243	62.5
				Lamb and mutton				
1935	877	4	---	881	2	3	876	6.9
1936	855	3	---	858	2	11	845	6.6
1937	852	11	---	863	2	3	858	6.6
1938	897	3	---	900	2	4	894	6.9
1939	872	4	---	876	3	5	868	6.6
1940	877	5	---	882	3	5	874	6.6
				Pork				
1935	5,919	688	11	6,618	136	327	6,155	48.3
1936	7,474	327	44	7,845	118	667	7,060	55.0
1937	6,951	667	80	7,698	114	399	7,185	55.6
1938	7,680	399	57	8,136	152	430	7,554	58.2
1939	8,660	430	45	9,135	192	469	8,474	64.7
1940	9,958	469	7	10,434	163	656	9,615	72.9
				All meats				
1935	14,361	833	212	15,406	191	436	14,779	116.0
1936	16,762	436	271	17,469	174	872	16,423	127.9
1937	15,709	872	307	16,888	167	463	16,258	125.8
1938	16,479	463	257	17,199	207	492	16,500	127.2
1939	17,534	492	265	18,291	247	551	17,493	133.6
1940	18,995	551	175	19,721	221	768	18,732	142.0

Continued -

Supply and disposition of major food commodities, 1935-40 1/ - Continued

Poultry products

Year	Supply: Production	Supply: Imports	Supply: Stocks beginning of period	Supply: Total supply	Disposition: Regular exports	Disposition: Stocks end of period	Disposition: Apparent consumption: Total	Disposition: Apparent consumption: Per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
	Chickens (dressed weight)							
1935	2,297	1	110	2,408	2	87	2,319	18.2
1936	2,392	2	87	2,481	1	148	2,332	18.2
1937	2,273	5	148	2,426	2	92	2,332	18.1
1938	2,214	2	92	2,308	2	110	2,196	16.9
1939	2,449	1	110	2,560	3	109	2,448	18.7
1940	2,424	2	109	2,535	2	140	2,393	18.1
	Turkeys (dressed weight)							
1935	267	---	19	286		17	269	2.1
1936	361	1	17	379		35	344	2.7
1937	346	---	35	381		26	355	2.8
1938	355	---	26	381		23	358	2.8
1939	422	---	23	445		52	393	3.0
1940	482	---	52	534		61	473	3.6

Year	Supply: Production	Supply: Imports	Supply: Stocks beginning of period	Supply: Total supply	Disposition: Regular exports	Disposition: Eggs used for hatching	Disposition: Stocks end of period	Disposition: Apparent civilian consumption: Total	Disposition: Apparent civilian consumption: Per capita 2/
	Mil. doz.	Mil. doz.	Mil. doz.	Mil. doz.	Mil. doz.	Mil. doz.	Mil. doz.	Mil. doz.	No. eggs
	Eggs								
1935	3,081	22	72	3,175	2	124	85	2,964	280
1936	3,166	27	85	3,278	2	134	61	3,081	289
1937	3,443	32	61	3,536	2	115	112	3,307	308
1938	3,424	6	112	3,542	2	124	59	3,357	310
1939	3,561	5	59	3,625	3	134	74	3,414	313
1940	3,629	7	74	3,710	5	125	77	3,503	319

Continued -

Supply and disposition of major food commodities, 1935-40 1/ - Continued

Dairy products

Year	Supply				Disposition				
								Apparent consumption	
	Production	Imports	Stocks beginning of period	Total supply	Regular exports	Shipments to U. S. territories	Stocks end of period	Total	Per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
	Total milk for human consumption								
1935	101,355	986	2,453	104,794	132	201	2,131	102,330	804.3
1936	102,481	849	2,131	105,461	107	198	3,146	102,010	796.6
1937	102,010	867	3,146	106,023	123	204	2,398	103,298	801.9
1938	105,783	581	2,398	108,762	160	232	4,576	103,794	799.5
1939	106,651	614	4,576	111,841	191	249	2,795	108,606	829.7
1940	109,341	355	2,795	112,491	478	279	2,729	109,005	826.0
	Butter, farm and factory								
1935	2,171	23	47	2,241	1	6	40	2,194	17.2
1936	2,131	10	40	2,181	1	5	61	2,114	16.5
1937	2,096	11	61	2,168	1	5	43	2,119	16.5
1938	2,240	2	43	2,285	2	6	129	2,148	16.5
1939	2,210	1	129	2,340	2	7	55	2,276	17.4
1940	2,240	1	55	2,296	3	8	41	2,244	17.0
	All cheese, except cottage, pot, and bakers' cheese								
1935	621	49	102	772	1	3	100	668	5.3
1936	643	60	100	803	1	3	110	689	5.4
1937	649	61	110	820	1	3	104	712	5.5
1938	725	54	104	883	1	3	120	759	5.8
1939	709	59	120	888	1	3	109	775	5.9
1940	786	33	109	928	2	4	130	792	6.0
	Condensed and evaporated milk								
1935	2,032	1	167	2,200	37	25	82	2,056	16.2
1936	2,270	2	82	2,354	26	24	268	2,036	15.9
1937	2,131	2	268	2,401	31	27	188	2,155	16.7
1938	2,322	1	188	2,511	29	29	212	2,241	17.3
1939	2,367	---	212	2,579	30	31	192	2,326	17.8
1940	2,731	---	192	2,923	146	30	196	2,551	19.3
	Ice Cream								
1935	937			937				937	7.4
1936	1,145			1,145				1,145	8.9
1937	1,320			1,320				1,320	10.2
1938	1,325			1,325				1,325	10.2
1939	1,431			1,431				1,431	10.9
1940	1,495			1,495				1,495	11.3

Continued -

Supply and disposition of major food commodities, 1935-40 1/ - Continued

Dairy Products

Year	Production	Imports	Stocks beginning of period	Total supply	Regular exports	Shipments to U. S. territories	Stocks end of period	Apparent consumption Total	Apparent consumption Per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
				Dried whole milk					
1935	19	2	2	23	2	1	3	17	.15
1936	18	4	3	25	2	1	4	18	.15
1937	14	2	4	20	2	1	3	14	.11
1938	21	---	3	24	4	1	4	15	.12
1939	24	---	4	28	6	1	4	17	.13
1940	29	---	4	33	8	1	5	19	.16
				Malted milk					
1935	15	---		15	2	---		13	.10
1936	18	---		18	2	1		15	.12
1937	20	---		20	3	1		16	.12
1938	15	---		15	4	1		10	.08
1939	20	---		20	5	1		14	.11
1940	20	---		20	3	1		16	.12
				Fluid milk and cream (fluid milk equivalent)					
1935	42,974	---	55	43,029	1	---	89	42,939	337.4
1936	43,925	4	89	44,018	1	---	135	43,882	342.7
1937	44,253	12	135	44,400	1	---	23	44,376	344.5
1938	44,358	---	23	44,381	---	---	174	44,207	340.5
1939	45,223	---	174	45,397	---	---	85	45,312	346.2
1940	45,591	---	85	45,676	3	---	95	45,578	345.4
				Dried skim milk for human consumption					
1935	188	---	19	207	1	---	6	200	1.6
1936	224	20	6	250	2	---	22	226	1.8
1937	245	1	22	268	2	1	21	244	1.9
1938	289	---	21	310	6	1	28	275	2.1
1939	268	1	28	297	2	1	9	285	2.2
1940	32	---	9	331	9	1	26	295	2.2

Continued -

Supply and disposition of major food commodities, 1935-40 1/ - Continued

Fats and oils

Year	Supply				Disposition				
	Production	Stocks beginning of period	Imports	Total supply	Exports	Shipments to U.S. territories	Stocks end of period	Apparent consumption	
								Total	Per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
	Lard (excluding amount used in manufactured products)								
1935	1,267	118		1,385	97	18	53	1,217	9.6
1936	1,672	53		1,725	112	25	146	1,442	11.3
1937	1,422	146		1,568	137	26	54	1,351	10.5
1938	1,718	54		1,772	205	29	107	1,431	11.0
1939	2,022	107		2,129	277	34	162	1,656	12.7
1940	2,313	162		2,475	201	31	294	1,949	14.8
	Compounds and vegetable cooking fats (fat content)								
1935	1,552	28	8	1,588	1		40	1,547	12.1
1936	1,614	40	6	1,660	2		45	1,613	12.6
1937	1,605	45	2	1,652	2		46	1,604	12.5
1938	1,517	46	2	1,565	2		56	1,507	11.6
1939	1,406	56	1	1,463	3		57	1,403	10.7
1940	1,196	57	1	1,254	4	5	54	1,191	9.0
	Margarine (fat content)								
1935	309	3		312	1		3	308	2.4
1936	325	3		328	1		3	324	2.5
1937	326	3		329	---		3	326	2.5
1938	312	3		315	---		3	312	2.4
1939	243	3		246	---		3	243	1.9
1940	257	3		260	1		3	256	1.9
	Other food products and uses (fat content) 3/								
1935	292	855	382	1,529	21		820	688	5.4
1936	449	820	295	1,564	20		836	708	5.5
1937	630	836	379	1,845	21		1,006	818	6.3
1938	794	1,006	196	1,996	18		1,080	898	6.9
1939	872	1,080	116	2,068	35		1,075	958	7.3
1940	910	1,075	71	2,056	40		1,011	1,005	7.6
	Total fats and oils (excluding butter)								
1935	3,420	1,004	390	4,814	120	18	916	3,760	29.5
1936	4,060	916	301	5,277	135	25	1,030	4,087	31.9
1937	3,983	1,030	381	5,394	160	26	1,109	4,099	31.8
1938	4,341	1,109	198	5,648	225	29	1,246	4,148	32.0
1939	4,543	1,246	117	5,906	315	34	1,297	4,260	32.5
1940	4,676	1,297	72	6,045	246	36	1,362	4,401	33.3

Continued -

Supply and disposition of major food commodities, 1935-40 1/ - Continued

Fruits

Year	Supply				Disposition				
	Production	Imports and shipments	Stocks beginning of period	Total supply	Exports	Shipments to U. S. territories	Stocks end of period	Apparent consumption Total	Apparent consumption Per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
	Citrus, fresh 4/								
1935	6,207.5	31.5		6,239.0	548.6	20.3		5,670.1	44.6
1936	6,337.3	36.6		6,373.9	459.4	14.5		5,900.0	46.1
1937	5,966.3	29.6		5,995.9	266.0	16.5		5,713.4	44.4
1938	7,155.6	15.1		7,170.7	783.9	26.9		6,359.9	49.0
1939	8,684.9	8.9		8,693.8	648.9	25.4		8,019.5	61.3
1940	7,908.1	21.2		7,929.3	413.2	31.8		7,484.3	56.7
	Apples, fresh								
1935	6,563.9	1.2	1,470.2	8,035.3	561.9	7.4	1,731.0	5,735.0	45.1
1936	4,570.0	.9	1,731.0	6,301.9	427.1	6.4	1,256.5	4,611.9	36.0
1937	7,510.5	1.1	1,256.5	8,768.1	379.2	9.0	1,936.1	6,443.8	50.0
1938	5,050.9	1.2	1,936.1	6,988.2	564.6	8.3	1,494.1	4,921.2	37.9
1939	6,410.3	2.2	1,494.1	7,906.6	402.2	9.1	1,423.4	6,071.9	46.4
1940	5,428.9	28.9	1,423.4	6,881.2	63.6	10.7	1,545.1	5,261.8	39.9
	Other fresh fruits (excluding melons) 5/								
1935	4,927.5	2,847.3	73.6	7,848.4	171.9	2.5	83.8	7,590.2	59.6
1936	4,256.7	3,046.2	83.8	7,386.7	212.3	3.4	73.9	7,097.1	55.4
1937	5,112.3	3,486.5	73.9	8,672.7	227.2	4.2	91.5	8,349.8	64.8
1938	4,741.1	3,114.5	91.5	7,947.1	289.7	4.3	134.8	7,518.3	57.9
1939	5,196.5	3,011.7	134.8	8,343.0	187.4	4.6	70.6	8,080.4	61.7
1940	5,001.3	2,769.0	70.6	7,840.9	111.0	5.2	80.1	7,644.6	57.9
	Canned fruits 6/								
1935	1,520.8	500.8	171.4	2,193.0	335.2	3.4	214.3	1,640.1	13.0
1936	1,544.9	646.2	214.3	2,405.4	261.4	4.7	148.9	1,990.4	15.9
1937	1,930.0	690.4	148.9	2,769.3	254.0	5.5	516.2	1,993.6	15.8
1938	1,319.7	451.2	516.2	2,287.1	335.1	7.0	207.8	1,737.2	13.6
1939	1,814.2	657.9	207.8	2,679.9	328.6	8.9	219.0	2,123.4	16.5
1940	1,694.9	568.2	219.0	2,482.1	59.3	9.9	142.3	2,270.6	17.6

Continued -

Supply and disposition of major food commodities, 1935-40 1/ - Continued

Fruits

Year	Supply: Production	Supply: Imports and shipments	Supply: Stocks beginning of period	Supply: Total supply	Disposition: Exports	Disposition: Shipments to U. S. territories	Disposition: Stocks end of period	Apparent consumption: Total	Apparent consumption: Per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
	Canned juices 7/								
1935	338.8	104.1	5.8	448.7			.9	447.8	3.5
1936	185.2	234.4	.9	420.5			8.3	412.2	3.2
1937	490.3	289.5	8.3	788.1			19.1	769.0	6.0
1938	586.0	223.4	19.1	828.5			12.1	816.4	6.3
1939	693.5	313.0	12.1	1,018.6			6.1	1,012.5	7.7
1940	793.8	352.7	6.1	1,152.6			42.2	1,110.4	8.4

Year	Supply: Pack	Supply: Stocks beginning of period	Supply: Imports	Supply: Total supply	Disposition: Exports	Disposition: Shipments to U. S. territories	Disposition: Stocks end of period	Apparent consumption: Total	Apparent consumption: Per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
	Frozen fruits 8/								
1935	77.2	63.0		140.2			81.0	59.2	.5
1936	70.1	81.0		151.1			71.0	80.1	.6
1937	111.3	71.0		182.3			125.0	57.3	.4
1938	129.2	125.0		254.2			126.0	128.2	1.0
1939	140.6	126.0		266.6			128.0	138.6	1.1
1940	172.4	128.0		300.4			142.5	157.9	1.2
	Dried fruits 9/								
1935	1,180.5	236.4	67.3	1,484.2	423.0	2.5	299.2	744.8	5.9
1936	935.5	299.2	71.5	1,306.2	359.9	2.4	239.2	695.7	5.4
1937	1,181.4	239.2	63.0	1,483.6	450.2	2.6	306.3	714.0	5.5
1938	1,204.5	306.3	56.0	1,566.8	477.8	2.4	354.0	711.5	5.5
1939	1,146.2	354.0	53.6	1,553.8	330.3	2.6	376.4	829.8	6.3
1940	822.5	376.4	47.8	1,246.7	142.8	1.8	234.6	849.1	6.4

Continued -

Supply and disposition of major food commodities, 1935-40 1/ - Continued

Vegetables

Year	Supply					Disposition			
	Production		Stocks beginning of period	Imports and shipments	Total supply	Exports and shipments to U.S. territories	Stocks end of period	Apparent consumption	
	Commercial	Total						Total	Per capita
	1,000 tons	1,000 tons	1,000 tons	1,000 tons	1,000 tons	1,000 tons	1,000 tons	1,000 tons	Lb.
	Fresh vegetables 10/								
1935	5,984	14,878	235	113	15,226	33	263	14,860	233.5
1936	6,144	14,199	263	137	14,599	58	233	14,166	221.3
1937	6,297	15,238	233	131	15,602	53	193	15,280	237.2
1938	6,718	16,330	193	112	16,635	67	257	16,098	248.0
1939	6,707	16,148	257	97	16,502	67	256	16,057	245.4
1940	6,804	15,961	256	118	16,335	65	267	15,915	241.2

Year	Supply				Disposition				
	Pack	Imports	Stocks beginning of period	Total supply	Exports	Shipments to U.S. territories	Stocks end of period	Apparent consumption	
								Total	Per capita
	1,000 cases 24 No. 2's	1,000 cases 24 No. 2's	1,000 cases 24 No. 2's	1,000 cases 24 No. 2's	1,000 cases 24 No. 2's	1,000 cases 24 No. 2's	1,000 cases 24 No. 2's	1,000 cases 24 No. 2's	Lb.
	Canned vegetables 11/								
1935	109,205	2,409	3,445	115,059	930	136	8,136	105,857	24.2
1936	98,213	2,073	8,188	108,474	781	171	7,524	99,998	22.6
1937	121,464	1,984	7,524	130,972	850	266	20,513	109,343	24.6
1938	108,273	2,502	20,513	131,288	872	301	26,678	103,437	23.1
1939	96,122	1,258	26,678	124,058	1,070	387	11,842	110,759	24.6
1940	116,901	652	11,842	129,395	1,019	440	6,103	121,833	26.7

Continued -

Supply and disposition of major food commodities, 1935-40 1/ - Continued

Vegetables

Year	Supply			Disposition					
	Production	Imports	Total supply	Exports and shipments	Feed and waste	Seed	Starch	Apparent consumption Total	Apparent consumption Per capita
	1,000 bu.	1,000 bu.	1,000 bu.	1,000 bu.	1,000 bu.	1,000 bu.	1,000 bu.	1,000 bu.	Lb.
	Potatoes 12/								
1935	372,984	864	373,848	3,000	32,676	42,743	1,632	293,797	138.0
1936	338,784	1,384	340,168	2,505	19,762	41,456	2,050	274,395	128.1
1937	376,237	683	376,920	3,383	28,654	45,313	3,970	295,600	137.1
1938	355,700	1,014	356,714	4,038	29,854	44,894	3,172	274,756	126.4
1939	344,767	1,874	346,641	3,933	25,282	42,199	3,106	272,121	124.2
1940	373,970	930	374,900	4,283	29,913	40,777	8,683	291,244	132.6

Year	Supply	Disposition				
	Production	Fed to livestock and wastage	Saved for seed on farms where grown	Farm household use 13/	Apparent consumption Total	Apparent consumption Per capita
	1,000 bu.	1,000 bu.	1,000 bu.	1,000 bu.	1,000 bu.	Lb.
	Sweetpotatoes 14/					
1935	81,249	7,432	6,043	36,299	67,774	29.2
1936	59,765	5,393	6,163	27,974	48,209	20.6
1937	68,144	6,705	6,454	32,577	54,985	23.4
1938	68,603	7,308	6,294	33,562	55,001	23.2
1939	61,873	6,611	5,821	32,410	49,441	20.7
1940	52,243	4,369	5,571	24,737	42,303	17.7

Year	Supply				Disposition				
	Production	Stocks beginning of period	Imports	Total supply	Exports and shipments	Seed	Stocks end of period	Apparent consumption Total	Apparent consumption Per capita
	1,000 100 lb. bags	1,000 100 lb. bags	1,000 100 lb. bags	1,000 100 lb. bags	1,000 100 lb. bags	1,000 100 lb. bags	1,000 100 lb. bags	1,000 100 lb. bags	Lb.
	Dry edible beans (cleaned basis) 14/								
1935	13,333	1,150	265	14,748	444	1,153	1,120	12,031	9.4
1936	10,767	1,120	703	12,590	349	1,240	925	10,076	7.8
1937	14,940	925	198	16,063	472	1,179	2,450	11,962	9.2
1938	14,717	2,450	141	17,308	692	1,175	3,150	12,291	9.4
1939	14,271	3,150	143	17,564	1,228	1,254	3,450	11,632	8.8
1940	15,732	3,450	217	19,399	1,986	1,426	3,500	12,287	9.3

Continued -

Supply and disposition of major food commodities, 1935-40 1/ - Continued

Sugar 15/

Year	Supply				Disposition			
	Production	Imports	Stocks beginning of period	Total supply	Exports and shipments to U. S. territories	Stocks end of period	Apparent consumption	
							Total	Per capita
	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	Lb.
1935	1,651	4,719	2,997	9,367	126	2,417	6,824	100.2
1936	1,832	4,804	2,417	9,053	70	2,308	6,675	97.4
1937	1,840	5,046	2,308	9,194	79	2,557	6,558	95.2
1938	2,386	4,730	2,557	9,673	70	2,927	6,676	96.1
1939	2,262	4,774	2,927	9,963	136	3,109	6,718	95.9
1940	2,229	4,642	3,109	9,980	182	3,274	6,524	92.4

Grains

	Supply				Disposition				
	Production	Stocks beginning of period	Imports	Total supply	Exports and shipments to U.S. territories	Stocks end of period	Feed, seed, and alcohol	Apparent consumption	
								Total	Per capita
	Mil. bu.	Mil. bu.	Mil. bu.	Mil. bu.	Mil. bu.	Mil. bu.	Mil. bu.	Mil. bu.	Lb.
					Wheat				
1935	628	432	27	1,087	8	428	187	464	218.8
1936	630	428	40	1,098	10	371	232	485	227.3
1937	874	371	9	1,254	9	533	237	475	221.2
1938	920	533	---	1,453	111	647	212	483	223.2
1939	741	647	---	1,388	93	606	204	485	222.3
1940	813	606	---	1,419	37	724	176	482	219.1
					Rye				
1935	56.9	22.1	9.7	88.7		31.3	47.3	10.1	4.4
1936	24.2	31.3	3.9	59.4		28.5	21.9	9.0	3.9
1937	48.9	28.5	0.2	77.6	4.3	20.8	43.5	9.0	3.9
1938	56.0	20.8	---	76.8	3.3	32.9	31.6	9.0	3.9
1939	38.6	32.9	---	71.5	0.1	30.5	31.9	9.0	3.9
1940	40.0	30.5	---	70.5	0.9	31.9	28.7	9.0	3.8

Continued -

Supply and disposition of major food commodities, 1935-40 1/ - Continued

Grains

Year	Supply				Disposition				
								Apparent consumption	
	Production	Stocks beginning of period	Imports	Total supply	Exports and shipments to U.S. territories	Stocks end of period	Feed, seed, and alcohol	Total	Per capita
	Mil. bu.	Mil. bu.	Mil. bu.	Mil. bu.	Mil. bu.	Mil. bu.	Mil. bu.	Mil. bu.	Lb.
	Rice 16/								
1935	39.5	26.5	1.9	67.9	17.3	24.7	2.6	23.3	5.1
1936	49.8	24.7	4.1	78.6	11.9	31.7	3.5	31.5	6.8
1937	53.4	31.7	6.7	91.8	18.4	38.4	4.5	30.5	6.6
1938	52.5	38.4	2.1	93.0	22.6	38.1	3.4	28.9	6.2
1939	54.1	38.1	2.6	94.8	22.9	38.3	3.3	30.3	6.4
1940	54.4	38.3	1.3	94.0	24.3	37.6	3.2	28.9	6.1
	Corn 17/								
1935	2,299	872	43	3,214	1	1,408	1,681	124	54.6
1936	1,506	1,408	31	2,945	1	826	1,980	138	60.4
1937	2,643	826	86	3,555	6	1,707	1,713	129	56.1
1938	2,549	1,707	---	4,256	148	1,868	2,107	133	57.4
1939	2,581	1,868	---	4,449	33	2,041	2,236	139	59.5
1940	2,462	2,041	2	4,505	39	2,033	2,295	138	58.6
	Barley 18/								
1935	289	73	13	375	7	187	127	54	20.2
1936	148	187	16	351	7	94	189	61	22.9
1937	222	94	20	336	12	127	135	62	23.1
1938	256	127	3	386	16	160	154	57	20.9
1939	278	160	4	442	6	181	198	57	20.9
1940	309	181	3	493	3	214	221	55	20.1
	Oats								
1935	1,210	369	10	1,589	1	821	738	29	7.4
1936	793	821	---	1,614	1	522	1,063	28	7.0
1937	1,177	522	---	1,699	8	734	930	27	6.7
1938	1,089	734	---	1,823	10	724	1,061	28	6.8
1939	958	724	4	1,686	1	615	1,042	28	6.9
1940	1,245	615	12	1,872	1	801	1,041	29	7.0

Continued -

Supply and disposition of major food commodities, 1935-40 1/ - Continued

Beverages

Year	Supply			Disposition			
	Stocks first of year 18/	Imports	Total supply	Stocks end of year 19/	Exports and shipments	Apparent consumption	
						Total	Per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
				Coffee			
1935	95	1,761	1,856	130	17	1,709	13.4
1936	130	1,747	1,877	101	16	1,760	13.7
1937	101	1,707	1,808	78	17	1,713	13.3
1938	78	1,991	2,069	121	14	1,934	14.9
1939	121	2,021	2,142	160	27	1,955	14.9
1940	160	2,059	2,219	153	25	2,041	15.5
				Tea			
1935	36	86	122	39		83	.7
1936	39	81	120	38		82	.6
1937	38	94	132	43		89	.7
1938	43	81	124	37		87	.7
1939	37	97	134	42		92	.7
1940	42	97	139	51		88	.7
				Cocoa			
1935	125	597	722	114		608	4.8
1936	114	607	721	74		647	5.1
1937	74	596	670	157		513	4.0
1938	157	441	598	139		459	3.5
1939	139	641	780	160		620	4.7
1940	160	679	839	194		645	4.9

Continued -

Supply and disposition of major food commodities, 1935-40 1/ - Continued

1/ Calendar years unless otherwise specified by a footnote.
2/ In terms of pounds of eggs the apparent per capita consumption was 35.0 in 1935, 36.1 in 1936, 38.5 in 1937, 38.8 in 1938, 39.1 in 1939, and 39.9 in 1940.
3/ This category represents fats and oils utilized as cooking and salad oils, in salad dressing, mayonnaise, in bakery products, and other minor uses such as fish canning.
4/ November-October year.
5/ Includes apricots, avocados, bananas, cherries (including noncommercial), cranberries, figs, grapes, peaches, pears, pineapples, plums and prunes (including noncommercial) and strawberries (including noncommercial).
6/ Pack year basis. Includes apples and applesauce, apricots, berries, cherries (including brined), cranberries, figs, fruit cocktail, fruits for salad, grapefruit segments, olives, pineapples, plums and prunes, peaches and pears.
7/ Includes grape, grapefruit, lemon, orange, pineapple, and miscellaneous.
8/ Principally cherries, strawberries, and other berries.
9/ Pack year basis. Includes apples, apricots, currants, dates, figs, peaches, pears, prunes and raisins. Pack, stock, and trade data are in terms of natural condition weight. The consumption figures are in terms of processed weight.
10/ Total production includes estimated quantities produced in market gardens, and on farms for household consumption. Total consumption has been adjusted for quantities of commercial truck crops not harvested; no adjustment could be made for undetermined quantities which are canned in farm households.
Vegetables included:
Commercial: Artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloups, carrots, cauliflower, celery, corn, cucumbers, eggplant, escarole, kale, lettuce, onions, peas, peppers, pimientos, shallots, spinach, tomatoes, watermelons.
Other: Anise, broccoli, brussels sprouts, chard, chicory, collards, cowpeas, cress (water), dandelions, dill, endive, fennel, garlic, greens (unspecified), horsebeans (green), horse radish, kohlrabi, mustard greens, okra, parsley, parsnips, pumpkin, radishes, rhubarb, romaine, rutabagas, rutabaga greens, salsify, sorrel, squash, turnips, turnip greens, mixed vegetables, chinese cabbage, other vegetables.
11/ Pack year basis. Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, peas, pimientos, pumpkin and squash, spinach, tomatoes, tomato pulp and tomato juice.
12/ Fiscal year basis.
13/ Included in civilian supply.
14/ Crop year basis.
15/ Sugar is in terms of raw except per capita which is on a refined basis.
16/ Rice is in terms of rough, except per capita which is on a milled basis.
17/ Meal and flour, starch, sirup, sugar, and malt liquor.
18/ Includes malt liquors, malt extracts, and other food products.
19/ Partial wholesale stocks only.

RETAIL PRICE CEILINGS ON FOODS, ISSUED MAY 15-JUNE 23, 1943

Date issued	Foods	Ceiling prices
5-25-43	White potatoes	Intermediate seller's mark-up limited to 60 cents per 100 lb., resulting in probable saving to consumer. Effective 5-25-43. (RMPR 271)
5-25-43	Dry onions	Intermediate seller's mark-up limited to 40 cents per 50 lb., resulting in probable saving to consumer. Effective 5-25-43. (RMPR 271)
6-1-43	Fresh tomatoes, snap beans, carrots, cabbage, peas, spinach, and lettuce	All sales by farmer to ultimate consumer included in regulation (formerly limited to sales exceeding $75 per month). Effective 6-7-43. (MPR 376, Am. 1)
6-4-43	Butter	10 percent reduction, amounting to 5 to 6 cents per lb. Effective 6-10-43. (RMPR 268, Am. 3)
6-7-43	Ice cream mix	Date of termination of order reducing price according to reduction of butterfat content extended from May 23 to July 23. Effective 5-23-43. (SR 14, Am. 184)
6-7-43	Groceries and perishable foods covered by community ceilings	Fixed mark-ups may not override community dollars-and-cents ceilings. Effective 6-12-43. (RMPR 238, Am. 2; RMPR 268, Am. 2)
6-7-43	Beef, veal, lamb, mutton, pork, certain processed meat products	10 percent reduction. Effective 7-5-43 for cured prok; 6-21-43 for all other items. (MPR 336, Am. 5; MPR 355, Am. 5)
6-12-43	White potatoes	By country shipper to ultimate consumer: maximum price f.o.b. country shipping point, plus 5 cents per 100 lb. through broker (or 6 cents on delivered basis), plus transportation, plus $1.00. Effective 6-12-43. (RMPR 271, Am. 2)

Date issued	Foods	Ceiling prices
6-12-43	Dry onions	By country shipper to ultimate consumer: maximum price f.o.b. country shipping point, plus 3 cents per 50 lb. through broker (or 4 cents on delivered basis), plus transportation, plus $1.00. Effective 6-12-43. (RMPR 271, Am. 2)
6-14-43	Fluid cream	Adjustment of maximum price for cream with 18 percent or more butterfat. Effective 6-19-43. (SR 14, Am. 185)
6-18-43	Domestic distilled spirits	Price adjustment at manufacturer's level for use of imported neutral spirits, resulting in price increase to consumer up to 30 cents per quart. Effective 6-24-43. (MPR 193, Am. 7)
6-21-43	Fluid milk and cream	Adjustment of maximum prices in specified areas for sales by hotels, restaurants, soda fountains, cafes, bars, and other eating establishments. Effective 6-26-43. (SR 14, Am. 188)

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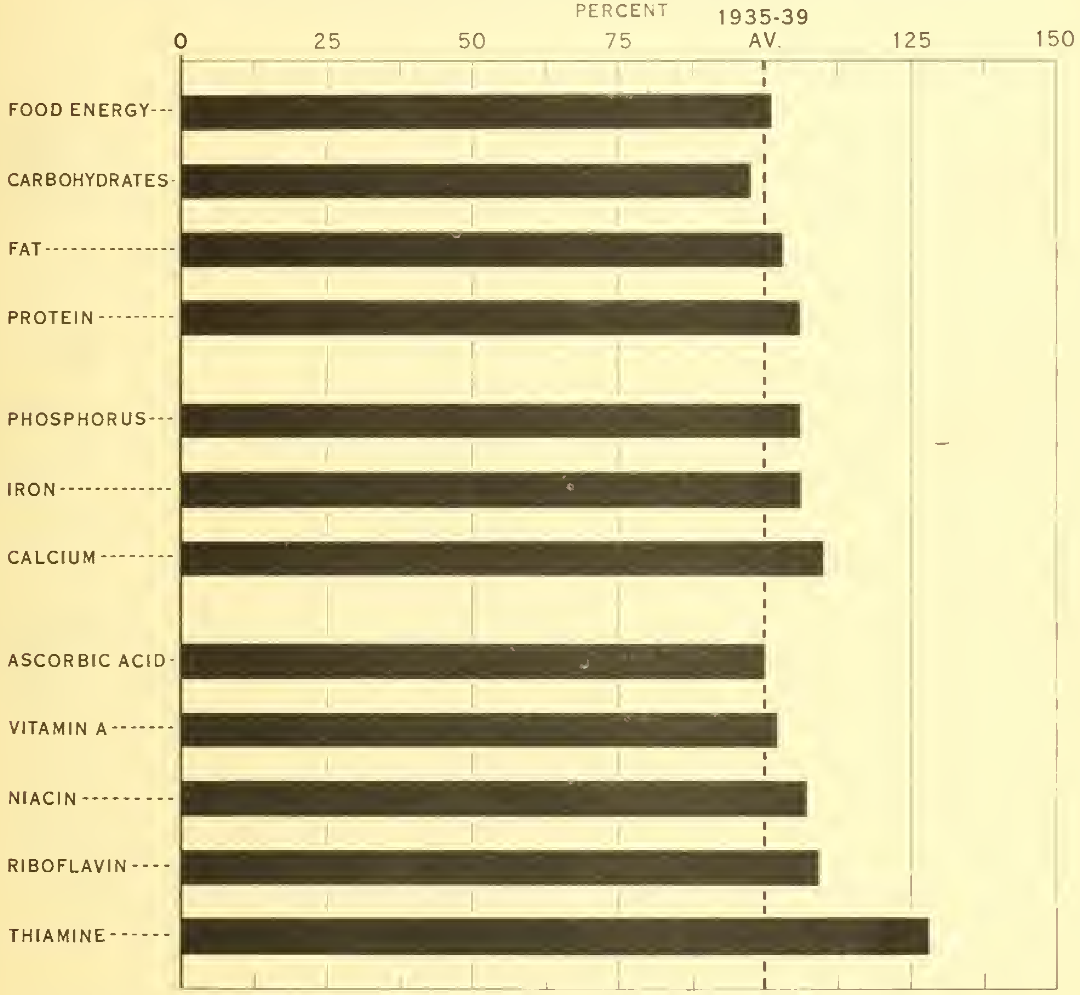
NUTRITIVE VALUE OF PER CAPITA CIVILIAN FOOD SUPPLY, UNITED STATES, ESTIMATED 1943 AS PERCENTAGE OF 1935-39 AVERAGE



DATA FROM B. A. E. AND BUR. OF HUMAN NUTR. AND HOME ECON.

U. S. DEPARTMENT OF AGRICULTURE NEG. 43187 BUREAU OF AGRICULTURAL ECONOMICS

Per capita consumption of most nutrients will be slightly higher in 1943 than the yearly average during 1935-39, nutritional analysis of the estimated civilian food supply for the full year 1943 indicates. Moreover, with rationing of the more important food commodities and with greater purchasing power, more people will get a fairer share of the total nutrients in 1943 than in the pre-war period. The increases in the per capita consumption of calcium, riboflavin, and thiamine are a result of increased consumption of fluid milk and the enrichment of bread and flour.

THE NATIONAL FOOD SITUATION

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Summary

Total food production in 1943 probably will exceed the record 1942 production by 4 percent and the average for the period 1935-39 by 31 percent. This forecast is based on the July crop report, the assumption of average weather for the remainder of the year and a continuation of the present trend in livestock production. Food crops are expected to be 10 percent below 1942 although 11 percent above the average for the period 1935-39. The drop in production of food crops, however, will be more than offset by an increase in livestock production. Food livestock production is expected to show a 10 percent increase over 1942 and a 38 percent increase over the 1935-39 average. The decline in food crop production is a result of a decrease in yield per acre and not a decrease in acreage. The total food crop acreage under cultivation in 1943 will exceed the 1942 acreage by 3 percent.

Seventy-five percent of our total 1943 food production has been allocated to civilians, about 13 percent to our military forces, 10 percent

to lend-lease, and the remaining 2 percent for shipments to our territories and for special needs.

Present estimates indicate that the civilian per capita consumption for the year as a whole will be about 4 percent larger than the average in 1935-39 but 6 percent smaller than the record consumption in 1941.

Total meat production for the year is expected to reach an all-time high of 23-1/4 billion pounds (dressed weight) which is 8 percent larger than 1942 and 44 percent larger than the average for the period 1935-39. Production of beef and veal, and lamb and mutton will probably be somewhat smaller than in 1942 but production of pork will exceed that of 1942 by about 18 percent. Production of poultry and eggs will be of record size. Chicken production is expected to reach the goal of 4 billion pounds, 34 percent above 1942 and 72 percent above the average for 1935-39. Production of turkeys probably will be about the same as in 1942 but about 43 percent above the 1935-39 average. It is expected that the production of eggs will reach 5 billion dozen, 13 percent above 1942 and 50 percent above the 1935-39 average. Total production of milk for human consumption is expected to be only about 1 percent less than in 1942, but because of increased consumption of fluid milk, production of cheese and evaporated milk will be about 13 percent lower than in 1942. Government restrictions on the use of milk solids will reduce the total production of ice cream about 20 percent below that in 1942. The production of butter, on the other hand, is expected to be about 4 percent higher. The output of edible fats and oils (excluding butter) for the year as a whole is estimated to be about 10 percent above 1942 and 42 percent above the 1935-39 average. Production of lard is likely to exceed the 1942 production by 15 percent, compounds and vegetable cooking fats by 12 percent, and margarine by about 46 percent. Citrus fruit production in 1943 has been of record size, 6 percent over 1942 and 22 percent above the average for the period 1935-39. However, due to late spring frosts and generally unfavorable weather the production of apples and other fresh fruits has shown a marked decline. Apple production probably will be 15 to 20 percent below 1942, and total deciduous fruit production may decline 12 to 14 percent. The pack of canned fruits in 1943 will be about 30 percent lower than last year but the pack of canned juices and dried fruits may be 54 and 13 percent respectively above last year. Commercial production of vegetables for the fresh market is now estimated at about 11 percent below that of 1942 but the potato crop is expected to be of record size. The production of sweet potatoes is expected to exceed last year's by 27 percent, dry edible beans by 12 percent and dry field peas by 35 percent.

Growing conditions were more favorable for grains in June and July than in earlier months. The total wheat crop is now estimated at 791 million bushels - 190 million bushels below the large crop of last year but 52 million bushels above the 10 year (1932-41) average. The corn crop is now indicated at about 2,700 million bushels, 15 percent below 1942 but 15 percent above the 10-year (1932-41) average. Because of the record number of livestock on farms, the feed supply per animal unit may be about 20 percent smaller than last year but only about 4 percent below the average for the period 1935-39.

Military food requirements are materially greater than in 1942. Lend-lease requirements for most items also are substantially greater than in 1942. However, the percentage of our production allocated to lend-lease for some commodities has been smaller in 1943 than in 1942. This is partly accounted for by increases in production of these items and partly by a downward revision in lend-lease allocations necessitated by short civilian supply.

Compared with 1942, civilians in 1943 will get a larger per capita supply of pork, eggs, chickens, fluid milk, fats and oils, fresh citrus fruits, canned juices, dried fruits, potatoes, and dry edible beans. However, the supply will be less for beef and veal, lamb and mutton, fish, most dairy products other than fluid milk, fresh and canned fruits, fresh and canned vegetables, sugar, rice, tea, and cocoa.

From a nutritional standpoint, the civilian per capita food supply compares favorably with the average for the period 1935-39. The 1943 per capita quantities of protein, minerals, and vitamin A are expected to be higher than the corresponding quantities in 1935-39, and for some nutrients will be as high as in 1941 and 1942. The calories in 1943 will be approximately the same as in 1935-39 but about 4 percent less than in 1942.

-- July 25, 1943

Table 1.- Volume of agricultural production for sale and for consumption in the farm home, and civilian per capita food consumption, 1940-43

Index numbers (1935-39 = 100)

Production	1940	1941	1942 1/	1943 2/
Food grains 3/	110	131	139	103
Truck crops 4/	111	116	127	116
Fruits 5/	110	113	115	107
Vegetables, excluding truck crops 6/	101	100	106	121
Sugar crops 7/	104	97	110	89
Total food crops 8/	109	116	124	111
Meat animals 9/	118	118	133	149
Poultry 10/	109	116	131	152
Dairy products 11/	105	110	114	114
Total food livestock	112	115	126	138
Total food production	111	115	126	131
Total agricultural production	110	113	125	127
Civilian per capita food consumption	105	111	108	104

1/ Revised.

2/ Production indexes are based on the July crop report and estimated marketings and home consumption of livestock and livestock products for the calendar year 1943.

3/ Includes wheat, rye, rice and buckwheat.

4/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloup, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes and watermelons) and truck crops for manufacture (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach and tomatoes).

5/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans and walnuts.

6/ Includes dry edible beans, potatoes and sweetpotatoes.

7/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar and maple sirup.

8/ Includes peanuts in addition to the other crops.

9/ Includes cattle and calves, sheep and lambs, and hogs.

10/ Includes eggs, chickens, turkeys, and broilers.

11/ Includes wholesale milk, retail milk, butterfat and farm butter.

Table 2.- Apparent civilian consumption on a per capita basis, 1935-39 average, 1941, 1942, and 1943 (preliminary), with percentage comparisons 1/

Commodity	1935-39	1941	1942	1943	1943 as a percentage of		
					1935-39	1941	1942
	Lb.	Lb.	Lb.	Lb.	Pct.	Pct.	Pct.
Meat (dressed weight)							
Beef and veal	63.1	69.0	68.2	58	92	84	85
Lamb and mutton	6.7	6.9	7.0	6	90	87	86
Pork (excluding lard)	56.5	67.3	59.3	60	106	89	101
Total meat	126.3	143.2	134.5	124	98	87	92
Fish							
Fresh and frozen (dressed weight)	6.4	7.1	5.6	4.5	70	63	80
Canned fish and shellfish	5.0	3.7	3.2	2.5	50	68	78
Cured fish	1.1	.9	.8	.7	64	78	88
Poultry products							
Eggs 2/	37.5	39.3	40.1	43	115	109	107
Chickens (dressed weight)	18.0	19.5	21.9	29	161	149	132
Turkeys (dressed weight)	2.7	3.6	3.8	3.5	130	97	92
Dairy products							
Total milk	806.5	814.5	848.7	774	96	95	91
Butter, farm and factory	16.8	16.0	15.7	13	77	81	83
Cheese	5.6	6.0	6.4	4.9	88	82	77
Condensed and evaporated milk	16.8	18.9	19.0	16	95	85	84
Ice cream	9.6	13.7	16.0	12	125	88	75
Fluid milk and cream 3/	342.3	353.7	376.2	388	113	110	103
Fats and oils (excluding butter)							
Lard	11.0	14.3	13.6	14	127	98	103
Compounds and vegetable cooking fats	11.9	10.5	8.9	9	76	86	101
Margarine	2.3	2.2	2.3	3.4	148	155	148
Other food products and uses	6.3	8.4	8.5	8	127	95	94
Total fats and oils	31.5	35.4	33.3	34.4	109	97	103
Fruits							
Fresh							
Citrus	49.1	56.9	53.1	55	112	97	104
Apples	4/ 43.1	32.3	28.8	25	---	77	87
Other fruit	59.9	60.0	49.2	33	55	55	67
Canned fruits	15.0	19.2	15.8	9	60	47	57
Canned juices	5.4	9.2	6.2	7	130	76	113
Frozen	.7	1.3	1.7	1.4	---	---	---
Dried	5.7	4.6	4.2	4.5	79	98	107

Continued -

Table 2.- Apparent civilian consumption on a per capita basis, 1935-39 average, 1941, 1942, and 1943 (preliminary), with percentage comparisons - continued

Commodity	1935-39	1941	1942	1943	1943 as a percentage of		
					1935-39	1941	1942
	Lb.	Lb.	Lb.	Lb.	Pct.	Pct.	Pct.
Vegetables							
Fresh	237.2	243.8	250.2	224	94	92	90
Canned	5/	41.6	43.1	36	---	87	84
Potatoes	130.0	121.2	123.8	131	101	108	106
Sweetpotatoes	23.4	20.6	22.2	26	111	126	117
Beans, dry edible	9.0	8.8	8.3	9	100	102	108
Sugar (refined)	97.0	105.0	89.0	75	77	71	84
Grains							
Wheat	222.4	220.8	223.7	226	102	102	101
Rye	3.9	3.8	3.9	4.4	113	116	113
Rice (milled)	6.2	5.5	6.2	6	97	109	97
Corn	57.6	64.8	74.7	74	128	114	99
Oats	6.9	7.1	7.9	8	116	113	101
Barley	21.6	22.6	27.2	28	130	124	103
Beverages							
Coffee	14.0	15.9	13.3	13	93	82	98
Tea	.7	.8	.5	.4	---	---	---
Cocoa	4.4	4.8	3.9	3.3	75	69	85

1/ Calendar years except for canned fruits, canned vegetables, and dried fruits which are on a pack-year basis and potatoes, sweetpotatoes, and dry beans which are on a crop-year basis. For detailed footnotes see table 4.

2/ In terms of number of eggs the apparent per capita consumption was 300 in 1935-39, 314 in 1941, 320 in 1942, and 347 in 1943.

3/ Fluid milk equivalent.

4/ Includes noncommercial which is not included in later years. Percentage comparison with 1943 is omitted since figures are not comparable.

5/ Comparable data for 1935-39 are not available.

NUTRITIVE VALUE OF THE PER CAPITA FOOD SUPPLY [1]

Since 1935-39, the nutritive value of the Nation's food has been increasing in spite of war shortages.

The United States civilian population had more calories, protein, fat, and larger quantities of the minerals and vitamins that contribute to good nutrition in 1940, 1941, and 1942 than they did in 1935-39. The 1943 per capita quantities of protein and the minerals and vitamins available to civilians are expected to be higher than the corresponding quantities in 1935-39 and for some nutrients will be about as high as in 1941 or 1942. Calories in 1943 will be approximately the same as in 1935-39 and about 4 percent less than in 1942. Table 3 shows the relative quantities of the nutrients in the civilian per capita food supply, with 1935-39 as the base period.

Dietary levels from 1935 to 1939, however, were far from satisfactory. Studies of individual family food consumption indicate that a large proportion of families had diets that were nutritionally poor.

The fact that the number of calories available in 1943 is less than in the past few years is no cause for concern. The difference is due chiefly to the smaller consumption of sugar this year. Furthermore, with greater care in the conservation of all food, the caloric value of the food actually eaten may be about as high as in previous years. Also, the average per capita energy requirement of the civilian population has decreased slightly, as more of the young men have gone into the armed forces.

The trend in some of the critically short nutrients has been consistently upward during the last few years. The amounts of calcium, thiamine, riboflavin, and niacin available in 1940, 1941, 1942, and 1943 are all higher than those in 1935-39.

A person's or a nation's calcium and riboflavin intake usually follows the trend in the quantities of milk consumed. Milk or milk products provide three-fourths of the total calcium and almost one-half of the total riboflavin in diets in this country. Consumption of fluid milk has increased steadily since 1935-39. In 1943 this increase was partially offset by the smaller amounts of cheese, ice cream, and evaporated milk available to civilians, yet the calcium content of the average per capita food available is estimated to be 10 percent higher in 1943 than in 1935-39 and the corresponding increase for riboflavin is 9 percent.

The upward trend in the thiamine content of the national food supply is quite marked, especially 1942 and 1943. Increases over 1935-39 are estimated as 15 percent for 1942 and 28 percent for 1943. This improvement in the thiamine picture can be traced to the flour and bread enrichment program. The amounts of thiamine which are added to meet the official levels set for enriched bread and flour are included in these estimates in addition to that from the natural sources in food. In 1935-39, before enrichment, grain products provided 15 percent of the total thiamine in the food supply. In 1943 the percentage is estimated to be 31 even though the expected per capita consumption of grain products is only 4 pounds (retail basis) per capita higher in 1943 than in 1935-39.

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[1] Prepared by Bureau of Human Nutrition and Home Economics.

Quantities of vitamin A and ascorbic acid available in the national food supply were higher in the early 1940's than they were in 1935-39. No consistent trend upward since 1940 is noted, however, because the consumption of fruits and vegetables has not increased markedly since then. Small decreases in the quantities of fruits and vegetables available in 1943 through commercial channels will lower the amounts of vitamin A and ascorbic acid during the year unless returns from victory gardens increase the per capita national supply beyond present expectations.

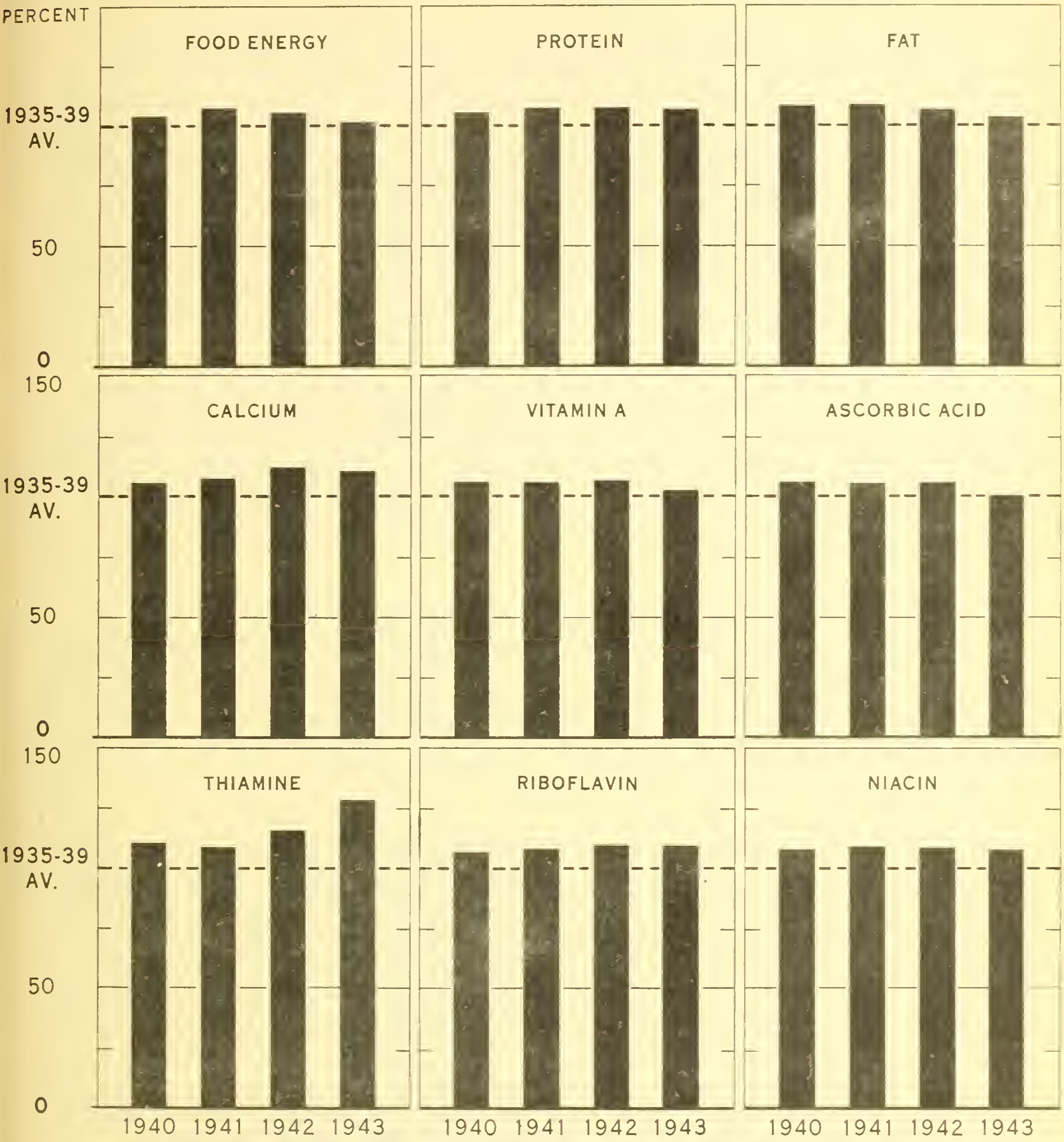
Table 3.- Relative nutritive value of the per capita civilian food supply of the United States, calendar years, 1935-39 average, 1940, 1941, 1942, and 1943 1/

(1935-39 = 100)

Year	Food energy	Protein	Fat	Carbohydrate	Calcium	Phosphorus	Iron	Vitamin A	Ascorbic acid	Thiamine	Riboflavin	Niacin
1935-39	100	100	100	100	100	100	100	100	100	100	100	100
1940	104	105	108	102	105	104	104	105	105	110	106	107
1941	107	107	108	108	107	106	104	105	105	108	107	108
1942	105	107	106	105	111	107	106	106	105	115	109	108
1943	101	106	103	98	110	106	106	102	100	128	109	107

1/ Data compiled by Bureau of Agricultural Economics and Bureau of Home Nutrition and Home Economics. Estimates for 1943 are preliminary.

NUTRITIVE VALUE OF PER CAPITA CIVILIAN FOOD SUPPLY, UNITED STATES, 1940-43 AS PERCENTAGES OF 1935-39 AVERAGE



DATA FROM B. A. E. AND BUR. OF HUMAN NUTR. AND HOME ECON.
DATA FOR 1943 ARE PRELIMINARY ESTIMATES

U. S. DEPARTMENT OF AGRICULTURE NEG. 43188 BUREAU OF AGRICULTURAL ECONOMICS

COMMODITY REVIEWS

Meat

Total meat production for the calendar year 1943 is now tentatively estimated at about 23-1/4 billion pounds, nearly 2 billion pounds more than in 1942 and much the largest total meat production on record. Of this total, about 4.8 billion pounds will be required for the armed forces and for lend-lease and other shipments. The meat supply and distribution estimates also provide for the setting aside of roughly 1 billion pounds of meat by the end of 1943 to meet unexpected war needs and to permit Government procurement agencies to get ahead on their requirements during the peak production season of the year. These extra stocks if accumulated will help materially in the over-all meat management program, and will permit a greater portion of the production in the slack season of the year to be made available to civilian consumers.

Because of the record large number of pigs raised during the past spring, the large number of cattle on farms, and some tightness in the feed situation, marketings of both hogs and cattle are expected to show a marked seasonal increase during the late summer and fall. The proportion of the year's total output of meat produced in the last half of the year probably will be greater than usual, and supplies available for civilians and Government procurement agencies will be more readily available than they were during May and June.

Although the outlook for total meat production in the last half of 1943 is encouraging, the ration allotments to civilians are not expected to be much different from allotments in the past 3 months. The per capita consumption for the year as a whole is expected to average about 124 pounds which is about 11 pounds less than in 1942 but only 2 pounds less than the average for 1935-39.

Poultry and Eggs

Consumption of chicken in the United States during 1943 will be about 30 percent larger than the near-record consumption in 1942. The production of the record quantity was encouraged by favorable farm prices for both eggs and chickens relative to feed and other costs. Preliminary data indicate that about 16 percent more chickens are being raised by farmers interested primarily in producing eggs. Production of commercial broilers also is continuing at record levels. Total chicken production now is about at the rate needed to reach the slaughter goal of 4 billion pounds, dressed weight.

More than 60 percent of the 1943 supplies of chicken will be available in the July-December period. The seasonal peak in marketings in the Midwest area usually is reached in October or November. Because of the strong demand for meat, it is likely that chicken prices will continue close to, or at ceiling levels, despite the large increase in supplies. Market reports continue to indicate that chickens are being sold at prices exceeding ceiling levels, particularly in Eastern sections.

Farmers intended to raise considerably more turkeys this year than in 1942. However, because of the shortage of turkey eggs for hatching it now appears likely that the number of turkeys raised in 1943 may barely reach the 1942 level. The demand for turkey will exceed the supply by an even greater margin next fall and winter than a year earlier. A preliminary estimate of the 1943 turkey crop will be published in late August.

In the past year, production of eggs has increased more rapidly than have the purchases for non-civilian uses (including lend-lease). Total egg production in the United States this year will be about 5 billion dozens compared with 4.4 billions in 1942. Per capita consumption of eggs is likely to exceed the previous record of 342 eggs established in 1927. Contrary to the seasonal distribution of supplies of poultry, supplies of eggs have passed the seasonal peak for the year and will decline considerably to the seasonal low in November. The demand will exceed the supply at ceiling prices by a sizeable margin in coming months even though supplies may be larger than a year earlier in each month. During most of the first half of 1943, egg prices were below ceiling levels and consumption was very heavy.

In early July market supplies of shell eggs began to run short of the demand in some Eastern markets even though some shell eggs were being withdrawn from storage. Combined holdings of shell and frozen eggs in storage on July 1 were at an all-time high but a sizeable portion of such holdings were earmarked for drying and other Government uses at a later date.

Dairy Products

Total production of milk for human consumption in 1943 is expected to be close to 118 billion pounds, which is about 1 percent below that of 1942 but 14 percent above the average for the period 1935-39. Production of some manufactured dairy products will be substantially reduced from that of 1942. As a result of an increased fluid milk consumption production of cheese and evaporated milk for the year as a whole will be about 13 percent lower than in 1942 and the Government restrictions on the use of milk solids will reduce the production of ice cream to about 80 percent of the 1942 level. Production of butter, however, may be about 4 percent larger than in 1942. Military and lend-lease allocations will account for 16 percent of the total butter production, 29 percent of the cheese production and 49 percent of condensed and evaporated milk. On the basis of present allocations and the ration programs, it is estimated that the civilian per capita supply of butter for the year as a whole will average about 13 pounds compared with 15.7 pounds in 1942, and 16.8 pounds in 1935-39. Cheese supplies will average 4.9 pounds per capita compared with 6.4 pounds in 1942 and 5.6 pounds in 1935-39. Supplies of condensed and evaporated milk will average 16 pounds per capita compared with 19 pounds in 1942 and about 17 pounds in 1935-39. On the other hand fluid milk consumption is expected to reach 388 pounds per capita compared with 376 pounds in 1942 and 342 pounds in 1935-39. The above estimates of the civilian supplies are based on tentative allocations for the fourth quarter of 1943. However, increased war requirements for cheese and evaporated milk together with the prospective lower production due to the continued high consumption of fluid milk point to some further reduction in civilian allocations of these products unless farmers can be induced to sell more of their milk as whole milk instead of separating it on the farm and selling cream or unless some method is worked out for checking civilian consumption of fluid milk. Plans along both of these lines are being considered but many difficult administrative problems are involved.

Total milk production in the first half of 1943 was about the same as in the corresponding period last year. Consumption of fluid milk, however, was larger than in the first half of 1942 so that production of manufactured dairy products was substantially smaller. Butter consumption during the first 6 months of 1943 was about 20 percent below a year earlier. Supplies under the rationing program were short in local areas, particularly along the East Coast, during June and July due to confusion over the roll-back and subsidy program. Cheese consumption was reduced materially when rationing was started on March 29, and consumption in the second quarter of 1943 was roughly 35 percent smaller than in the first quarter of this year. Stocks of both butter and cheese have accumulated rapidly under the orders requiring that 50 and 70 percent, respectively, of monthly production be set aside for war use. These will be needed to maintain consumption during the winter low production season.

Consumption of evaporated milk during the first 5 months of 1943 was almost as large as a year earlier but was reduced substantially when rationing was started on June 2. Rationing was needed to conserve supplies for infants and people who do not have access to fresh milk. Consumption is expected to be reduced by about 40 percent under the rationing program.

Total milk production in the last half of 1943 may be 1 to 3 percent below a year earlier. The most important factor affecting milk production will be the prospective tight feed situation in the second half of the year. While consumption of fluid milk and cream may be reduced somewhat in the late fall and winter months owing to shortages of supplies in some areas, fluid milk consumption as a whole is expected to continue at a high level.

Fats and Oils

The production of edible fats and oils (excluding butter) for the year as a whole is expected to be about 10 percent above 1942 and 42 percent above the 1935-39 average. Production of lard is expected to exceed the 1942 production by 15 percent, compounds and vegetable cooking fats by 12 percent, and margarine by 46 percent. Twenty-eight percent of the total expected lard output and 30 percent of other edible fats and oils (excluding butter) have been allocated to our military forces and to our Allies. The civilian supply of total fats (including butter) under rationing will amount to about 47 pounds per capita in calendar year 1943 compared with 49 pounds in 1942 and 48 pounds in the period 1935-39.

Despite the apparent abundance of finished fats and oils under rationing, the raw material situation remains tight. Factory and warehouse stocks of animal and vegetable fats and oils were about 125 million pounds (6 percent) smaller on June 1 this year than last, and stocks will be drawn down during the summer months as production of vegetable oils from the 1942 oilseed crop declines seasonally. Production of both animal fats and vegetable oils in 1943-44 is likely to be larger than in 1942-43, although the increase in the coming crop year will be less marked than in the 1942 crop year. But military and lend-lease requirements also will be greater, particularly if important areas of Europe are reoccupied.

With the exception of margarine, disappearance of the principal food fats from factories and farms for civilian consumption during the first 2 months of rationing (April and May) was somewhat above ration levels. Stock building by wholesale and retail distributors probably accounts for most of the excess disappearance. Factory sales are likely to decline to ration levels as dealers become better supplied.

Sales of margarine which were at a record level in the first quarter of the year, declined sharply in April and May. The large sales in January-March resulted chiefly from a shortage of butter and uncertain outlook for new supplies in that period. With rationing instituted in April, consumption of butter was maintained at a high level in relation to supplies, but with point values for butter and margarine set at 8 and 5, respectively, consumption of margarine declined. Recently the point value for margarine was lowered from 5 to 4.

Estimated factory and farm disappearance of principal food fats for civilian consumption, monthly averages 1940-41, 1942, and January-May 1943

Item	Average 1940-41	1942	1943 1/	
			Jan.-Mar.	Apr.-May
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Butter, including farm	181	171	146	147
Margarine (actual weight)	28	30	54	27
Lard and rendered pork fat 2/	159	148	166	152
Shortening	107	98	109	100
Total, four items	475	447	475	426

Basic data compiled from reports of Bureau of the Census, Bureau of Internal Revenue, Bureau of Agricultural Economics, and Food Distribution Administration.

1/ Preliminary. Consumer rationing for these items and for cooking and salad oils (not shown) was instituted March 29, 1943.

2/ Excludes lard and rendered pork fat used in manufacture of shortening, margarine, etc.

Fruits

On the basis of July 1 conditions, total deciduous fruit production in 1943 is estimated to be 12 to 14 percent smaller than in 1942. The production of peaches is expected to be 35 percent smaller than in 1942, pears, 25 percent; sweet cherries, 20 percent; sour cherries, 49 percent; apricots, 51 percent; and plums, 11 percent. The prune and grape crops in 1943 are expected to be 11 percent and 9 percent larger, respectively, than the crops in 1942. Indications are that the apple crop will be smaller than the crop last year. Prospects for citrus fruit, as of July 1, indicate a production during the 1943-44 season (crops from the 1943 bloom) approximately the same as in the 1942-43 season. If such citrus crops are harvested, it appears probable that total fruit production in the United States will be about 6 to 8 percent smaller this season than last. However, supplies of deciduous fruits in the Eastern States and particularly in the South Atlantic States are expected to be very short.

Carlot shipments of 1943 deciduous fruit crops this season, excluding berries, totaled 7,606 cars through July 10, or about four-fifths the number of cars of these fruits shipped last season during the same period. Car loadings, however, probably average somewhat heavier this season. Shipments of prunes, plums, and grapes have been larger thus far this season than in 1942, but shipments of strawberries and peaches have been about two-fifths and one-half, respectively, of the shipments during the same period of 1942.

Supplies of fresh fruits during the next few weeks, with the possible exceptions of citrus fruits and prunes, are expected to continue materially smaller than a year ago. This shortage will be most noticeable in the Eastern States, particularly in peaches and pears. Civilian supplies of fresh deciduous fruits during the entire 1943-44 season probably will not exceed three-fourths the quantity consumed during the preceding season. However, civilian supplies of fresh citrus fruits are expected to be about as large in 1943-44 as in 1942-43, providing conditions for citrus production remain favorable.

The total pack of canned fruits and fruit juices in 1943-44 is expected to be materially smaller than last season. The pack of deciduous fruits probably will not exceed three-fourths that of 1942. The dried fruit pack is expected to be about 13 percent larger than in 1942. Military and lend-lease requirements will account for about 54 percent of the total pack of canned fruits and fruit juices and 38 percent of the dried fruit pack. Civilian supplies of canned fruits and fruit juices during 1943-44 may be only about 70 to 75 percent the quantity consumed during 1942-43. Fruit juices are expected to be in more plentiful supply relatively, than canned fruits. Civilian supplies of frozen fruits are expected to be smaller in 1943-44 than last season, but supplies of dried fruits may be somewhat larger.

Vegetables

Commercial production of vegetables during the 1943 season for shipment into the fresh market is now estimated at about 11 percent below that of 1942. Civilian supplies of such vegetables are expected to be 15 to 20 percent smaller than in 1942 as a result of somewhat larger Government requirements this year. These smaller civilian supplies of commercial fresh vegetables will be offset to some extent by victory garden production.

The 1943 planted acreage of vegetables for processing is estimated to be 1 percent larger than last year's and 56 percent above the 1932-41 average. Indicated increases in acreage compared with 1942 are 18 percent for snap beans, 7 percent for beets, 6 percent for sweet corn, 4 percent for kraut cabbage, and 2 percent for green peas. However, the following decreases in acreage are expected: Cucumbers for pickles, 29 percent; California and Texas spinach, 23 percent; lima beans, 7 percent; tomatoes, 2 percent; and pimientos, 1 percent.

The general level of yields of vegetables for processing is likely to be somewhat lower this year than in 1942, and consequently production will be smaller than last year. Present indications are that the canned vegetable pack will be about 10 percent smaller than in 1942, but the size of this pack will be influenced materially by growing conditions, labor supply, and other factors during the remainder of the season. The dehydrated and frozen vegetable packs are expected to be much larger this year than in 1942. Military and lend-lease requirements are expected to account for 32 percent of the 1943-44 pack of canned vegetables. The supply of canned vegetables for civilians will be close to 36 pounds per capita in 1943 compared with 43 pounds in 1942.

Supplies of vegetables for the fresh market in the next few weeks are expected to be considerably larger than in June and early July. Snap beans, carrots, tomatoes, cabbage, and beets, however, are the only vegetables likely to be in somewhat larger supply than in 1942. Indications are that cantaloups, cauliflower, celery, cucumbers, onions, and watermelons will continue in short supply.

Dry Edible Beans and Dry Field Peas

Present indications point to a production of dry edible beans in 1943 of 22 million bags (100-pound bags, uncleaned basis), 12 percent larger than the crop of last year. Military and lend-lease requirements will account for about 1/3 of the total production but civilian supplies in 1943-44 are expected to be somewhat larger than last year.

June 1 stocks of beans on farms and in usual commercial storage places (excluding beans in direct consumption channels) totaled 4.5 million bags, about 2.1 million bags less than the stocks June 1, 1942.

The 1943 crop of dry field peas is estimated at 9.7 million bags (100-pound bags, uncleaned basis), 35 percent larger than the record crop of 1942. Stocks on June 1 of this year were somewhat larger than a year earlier. Civilian supplies of dry peas in 1943-44 should be adequate to meet demand.

Potatoes and Sweetpotatoes

A record potato crop of 450 million bushels is in prospect for 1943-44. Harvest in the early producing States is nearing completion, and production is estimated at 19 percent above last year's. Digging is well under way in Virginia, New Jersey, and other "intermediate" potato producing States. The crop in these States is expected to be about 14 percent larger than in 1942. Indicated production in the 30 late producing States is 16 percent larger than for last season.

Supplies of potatoes on the market during the next few weeks are expected to continue to be abundant -- considerably above those of a year ago. The War Food Administration has said that civilians can help to relieve the present market situation by purchasing potatoes now and deferring the digging of victory garden potatoes for a few weeks until commercial production is of the type that can be moved into storage. The supply of potatoes for civilians during the 1943-44 season is expected to be at least 5 percent larger than the quantity consumed in 1942-43.

A sweetpotato crop of about 83 million bushels, 27 percent larger than the crop of 1942, is indicated for 1943. Civilian supplies in 1943-44 probably will be 15 to 20 percent larger than in 1942-43.

Wheat, Rye, and Rice

The July crop report indicates a total wheat production of 791 million bushels -- 60 million bushels above the indication of a month earlier. A crop of this size is 190 million bushels below the large crop of last year but 52 million bushels above the 10-year (1932-41) average. With a carry-over on July 1 of about 600 million bushels the total prospective domestic supply is 1.4 billion bushels. Wheat disappearance in 1943-44 is expected to reach an all-time record of 1.1 billion bushels compared with an average disappearance of 720 million bushels in 1932-41. This would reduce the carry-over on July 1, 1944 to about 250 million bushels. Wheat for domestic food consumption is not expected to exceed the 1942-43 level of 535 million bushels, which is 9 percent above that of 1941-42. For the first time in our history nonfood uses (animal feed and alcohol production), and exports are expected to exceed the quantity used for food. Unlike the beginning of the 1943-44 marketing year, stocks of old wheat carried over July 1, 1944 will not be large enough to make up for another crop much short of total requirements. On the basis of this prospect the War Food Administrator recently announced a 1944 wheat acreage goal 26 percent larger than the seedings for the 1943 crop. The announcement of the goal at this time will help growers to plan for their fall seedings which begin in September.

The rye production indicated July 1, at 33.6 million bushels, was almost unchanged from a month earlier. With stocks of rye at the beginning of the 1943-44 year amounting to 42.4 million bushels, the total domestic supply for 1943-44 will be 76 million bushels, compared with 88 million bushels in 1942-43, and an average of 57 million bushels in 1934-41. Since only about 10 million bushels of rye are needed for food and 8 for seed, large quantities will be available for animal feed and production of industrial alcohol.

Based on July 1 condition, the first official estimate of the rice crop was 71.8 million bushels. This is 8 percent above the previous record crop of 66.4 million bushels in 1942 and 52 percent above the 10-year (1932-41) average of 47.3 million bushels. A crop of this size would provide for prospective requirements and leave a moderate carry-over at the end of the 1943-44 marketing year.

The Feed Situation

Growing conditions were more favorable for feed grain production during June and early July then earlier in the season and there was some improvement in the prospects for 1943-44 feed supplies. On the basis of July 1 conditions the total supply of feed grains including wheat and rye for feed, in 1943-44 will be about 137 million tons, 18 million tons smaller than the record supply last year, but 34 million tons above the 1935-39 average. The estimate of the total supply of feed grains includes 300 million bushels of wheat, together with expected imports of oats, barley, and wheat for feed, and domestic supplies of 4 feed grains. If this amount of wheat is used for feed, stocks on July 1, 1944, will be reduced to 250 million bushels. During the 1942-43 season nearly 340 million bushels of domestic wheat were fed to livestock. The supply of vegetable byproduct feeds available for feeding in 1943-44 is expected to total approximately 14.0 million tons, or about the same as last year. The supply of oilcake and meal for feed may be a little smaller, but wheat millfeeds probably will be somewhat larger.

Supply and disappearance of feed per animal unit, United States, 1935-43

Year	Supply of feed grains 1/	Supply of by-product feeds 2/	Total	Disappearance of feed grains and by-product feeds	Grain consuming animal units	Supply per animal unit	Disappearance per animal unit
	Mil. tons	Mil. tons	Mil. tons	Mil. tons	Million	Tons	Tons
Average 1935-39	103.7	9.8	113.5	97.2	126.4	.90	.77
1940	125.4	11.1	136.5	112.3	133.4	1.02	.84
1941	132.8	11.4	144.2	124.5	143.1	1.01	.87
1942	3/ 154.9	13.9	168.8	151.0	158.9	1.06	.95
1943	3/ 137.3	14.0	151.3	146.0	175.0	.86	.83

1/ Four feed grains plus wheat and rye fed.

2/ Oilcake and meal, wheat and rice millfeeds, gluten feed and meal, brewers' and distillers' dried grains and dried beet pulp.

3/ Includes estimated imports of oats, barley, and feed wheat from Canada.

Livestock numbers are increasing and on January 1, 1944, the number of grain-consuming animal units on farms is expected to be about 10 percent larger than on January 1, 1943. In this event the indicated feed supply would amount to .86 tons per animal, 19 percent smaller than last year, but only about 4 percent below the 1935-39 average. Even if stocks of feed grains are reduced to a minimum, disappearance per animal may be 10 to 15 percent smaller than in 1942-43, although larger than during the period 1935-39.

As a result of the smaller supplies of feed available for 1943-44 there probably will be a tendency to feed livestock to lighter weights and it may also be necessary to reduce the number of some classes of livestock.

Total stocks of corn on July 1, 1943 were 827 million bushels, 30 million bushels smaller than a year earlier. During April-June, disappearance of corn was 15 percent greater than in this quarter of 1942 and oat disappearance was 21 percent greater. A carryover next October 1 of about 400 million bushels of corn is in prospect.

Receipts of corn at primary markets continue small with only 2.6 million bushels received for the week ended July 16. Commercial stocks of corn were reduced from 20.3 million bushels early in June to 9.6 million bushels early in July which is the lowest level in recent years.

Table 4.- Production of major food commodities, calendar years, 1935-39 average, 1941, 1942, and 1943 (preliminary), with percentage comparisons

Commodity	Unit	1935-39	1941	1942	1943	1943 as a percentage of 1935-39	1943 as a percentage of 1941	1943 as a percentage of 1942
Meats (dressed weight)								
Beef and veal	Mil. lb.	7,962	9,121	9,782	9,700	122	106	99
Lamb and mutton	"	871	925	1,036	950	109	103	92
Pork (excluding lard)	"	7,337	9,447	10,642	12,600	172	133	118
Total meats	"	16,169	19,493	21,460	23,250	144	119	108
Fish								
Fresh and frozen (dressed) 1/	"	730	879	771	633	87	72	82
Canned fish 1/	"	699	726	647	692	99	95	107
Cured fish	"	82	73	70	63	77	86	90
Poultry products								
Chickens (dressed weight)	"	2,325	2,641	2,990	4,000	172	151	134
Turkeys (dressed weight)	"	350	467	497	500	143	107	101
Eggs	Mil. doz.	3,335	3,828	4,420	5,000	150	131	113
Dairy products 2/								
Total milk 3/	Mil. lb.	103,656	115,196	118,776	118,100	114	103	99
Butter, farm and factory	"	2,170	2,268	2,118	2,205	102	97	104
All cheese 4/	"	669	951	1,109	968	145	102	87
Condensed and evaporated milk	"	2,224	3,555	3,782	3,300	148	93	87
Ice cream	"	1,232	1,834	2,160	1,740	141	95	81
Fluid milk and cream 5/	"	44,147	46,900	49,433	51,000	116	109	103
Dried skim milk 3/	"	243	366	565	549	226	150	97
Fats and oils (excluding butter) -								
Lard 6/	"	1,620	2,213	2,371	2,730	169	123	115
Compounds and vegetable cooking fats 7/	"	1,539	1,418	1,286	1,437	93	101	112
Margarine 7/	"	303	297	349	510	168	172	146
Other food products and uses 8/	"	607	1,053	1,252	1,092	180	104	87
Total fats and oils	"	4,069	4,981	5,258	5,769	142	116	110

Continued -

Table 4.- Production of major food commodities, calendar years, 1935-39 average, 1941, 1942, and 1943 (preliminary), with percentage comparisons - continued

Commodity	Unit	1935-39	1941	1942	1943	1943 as a percentage of 1935-39	1941	1942
Fruits								
Fresh								
Citrus 9/	Mil. lb.	6,870	8,112	7,926	8,410	122	104	106
Apples 10/	"	6,021	4,270	4,288	3,500	---	82	82
Other (excluding melons) 11/	"	4,807	5,349	5,199	3,691	77	69	71
Processed								
Canned fruits 12/	"	1,666	2,298	2,273	1,621	97	71	71
Canned juices 13/	"	459	939	856	1,322	288	141	154
Dried fruits 14/	"	1,127	904	1,019	1,156	103	128	113
Frozen fruits 15/	"	106	202	229	180	170	89	79
Vegetables								
Fresh 16/	1,000 tons	15,359	16,096	16,829	14,947	97	93	89
Canned 17/	1,000 cases 24 No. 2's	18/	209,469	238,575	220,600	---	105	92
Potatoes	1,000 bu.	357,551	357,471	377,212	449,942	126	126	119
Sweetpotatoes	"	67,927	62,144	65,380	82,987	122	134	127
Dry edible beans	1,000 100 lb. bags	13,606	17,047	18,139	20,480	151	120	113
Sugar (raw basis)	1,000 short tons	1,994	2,090	2,150	1,736	87	83	81
Grains								
Wheat	Mil. bu.	759	943	981	791	104	84	81
Rye	"	45	45	57	34	76	76	60
Rice	"	50	51	66	72	144	141	109
Corn	"	2,316	2,676	3,175	2,707	117	101	85
Oats	"	1,045	1,181	1,359	1,242	119	105	91
Barley	"	239	362	426	354	148	98	83

Continued -

Table 4.- Production of major food commodities, calendar years, 1935-39 average, 1941, 1942, and 1943 (preliminary), with percentage comparisons - Continued

1/ Including shellfish. 2/ Calculated on fat solids equivalent. 3/ For human consumption. 4/ Excluding cottage, pot, and bakers' cheese. 5/ Fluid milk equivalent for fresh use. 6/ Excluding amount used in manufactured products. 7/ Fat content. 8/ Fat content. Represents fats used in cooking and salad oils, salad dressing, mayonnaise, in bakery products, and other minor uses such as fish canning. 9/ Harvesting usually begins in November of the preceding year. 10/ 1935-39 production includes estimated noncommercial production, which is excluded in succeeding years. Percentage comparison between 1943 and 1935-39 is omitted since estimates are not comparable. 11/ Includes apricots, avocados, bananas, cherries (including noncommercial), cranberries, figs, grapes, peaches, pears, pineapples, plums and prunes (including noncommercial), and strawberries (including noncommercial). 12/ Includes apples and applesauce, apricots, berries, cherries (including brined), cranberries, figs, fruit cocktail, fruits for salad, grapefruit segments, olives, pineapples, plums and prunes, peaches, and pears. 13/ Includes grape, grapefruit, lemon, orange, pineapple, and miscellaneous. 14/ Includes apples, apricots, currants, dates, figs, peaches, pears, prunes, and raisins. 15/ Principally cherries, strawberries, and other berries. 16/ Commercial production, market gardens, and farm production for home use. Vegetables included, commercial: Artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloups, carrots, cauliflower, celery, corn, cucumbers, eggplant, escarole, kale, lettuce, onions, peas, peppers, shallots, spinach, tomatoes, watermelons. Other: Anise, broccoli, brussels sprouts, chard, chicory, collards, cowpeas, cress (water), dandelions, dill, endive, fennel, garlic, greens (unspecified), horsebeans (green), horse radish, kohlrabi, mustard greens, okra, parsley, parsnips, pumpkin, radishes, rhubarb, romaine, rutabagas, rutabaga greens, salsify, sorrel, squash, turnips, turnip greens, mixed vegetables, Chinese cabbage, other vegetables. 17/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, peas, pimientos, pumpkin and squash, spinach, tomatoes, tomato pulp and tomato juice, cabbage (kraut), hominy, Irish potatoes, sweetpotatoes, kraut juice, okra, rhubarb, succotash, tomato sauce, paste, and catsup, vegetable puree (including baby foods), other greens, and mixed vegetables.
18/ Comparable data for 1935-39 are not available.

RETAIL FOOD COSTS, JUNE 1943

Retail food prices in mid-June averaged about the same as in mid-May. The Bureau of Labor Statistics index showed a decrease of 0.8 percent for all foods combined. This, however, represents an increase of 15.2 percent over June 1942, or an average of 1.3 percent per month during the past year. The total cost-of-living index dropped 0.2 percent from May to June.

The seasonal increase of 2.9 percent in egg prices from May to June was offset by a decrease of 2.4 percent for dairy products and 1.8 percent for fresh fruits and vegetables.

The decrease in prices of dairy products is due to a reduction of 9.2 percent in the price of butter, resulting from the roll back and subsidy payment effective June 10.

Price increases for fresh fruits reflect about the usual seasonal trend. With the exception of potatoes and onions, prices of fresh vegetables declined somewhat more than seasonally from the abnormally high prices in May. Contrary to the usual seasonal trend, the price of potatoes decreased, and the price of onions increased. The late marketing of certain early potatoes caused a short supply in May and an unusually large supply in June, resulting in relatively high prices in May and a corresponding decline in June. The largest price changes between mid-May and mid-June were as follows:

Commodity	Percent change
Apples	+15.5
Grapefruit	+11.5
Onions	+ 4.7
Oranges	+ 3.6
Lettuce	- 7.9
Potatoes	- 9.0
Green beans	- 9.2
Spinach	-12.1
Cabbage	-13.0

The following table shows the increase in prices of fresh fruits and vegetables over June 1942:

Commodity	Percent increase
Sweetpotatoes	206.8
Cabbage	92.3
Onions	80.0
Apples	58.5
Green beans	54.9
Lettuce	46.2
Potatoes	45.7
Spinach	37.8
Oranges	20.7
Carrots	20.3
Grapefruit	16.0
Bananas	11.4

Table 5.- Index numbers of retail food prices and total cost of living United States, specified periods (1935-39 = 100)

Year and month	Meats	Eggs	Dairy products	Fats and oils	Cereals and bakery products	Fruits and vegetables: Fresh	Fruits and vegetables: Canned 1/	Fruits and vegetables: Dried	Fruits and vegetables: Total	Sugar	All foods	Total cost of living
1941	108	112	112	94	98	104	98	107	103	106	106	105
1942	126	136	125	120	105	133	122	136	131	127	124	116
1941												
Jan.	101	97	105	80	95	93	91	100	93	95	98	101
Feb.	102	85	104	81	95	96	92	100	96	96	98	101
Mar.	102	83	105	81	95	98	92	99	97	98	98	101
Apr.	104	92	106	85	95	102	93	100	101	105	101	102
May	104	94	108	88	95	106	94	103	104	107	102	103
June	107	104	110	92	96	116	96	105	112	107	106	105
July	109	115	112	97	96	109	98	106	107	108	107	105
Aug.	111	121	114	99	99	104	100	109	103	109	108	106
Sept.	116	133	118	103	101	99	102	111	100	112	111	108
Oct.	113	137	120	106	102	104	104	113	104	112	112	109
Nov.	110	146	121	107	102	111	105	116	110	113	113	110
Dec.	111	138	120	108	102	111	106	118	110	114	113	110
1942												
Jan.	116	131	122	111	103	119	109	122	117	118	116	112
Feb.	118	119	122	114	104	118	115	125	118	128	117	113
Mar.	120	112	122	117	105	124	121	128	123	128	119	114
Apr.	122	111	122	120	105	126	122	131	126	128	120	115
May	124	115	123	122	105	130	123	131	129	127	122	116
June	127	120	122	120	105	137	122	133	134	127	123	116
July	128	130	123	120	105	139	122	134	136	127	125	117
Aug.	130	146	126	120	105	135	123	139	133	127	126	118
Sept.	131	155	128	121	105	130	124	143	130	127	127	118
Oct.	131	165	131	121	106	139	125	150	137	127	130	119
Nov.	132	166	132	124	106	145	127	150	142	127	131	120
Dec.	133	167	132	125	106	151	128	150	147	128	133	120
1943												
Jan.	135	166	134	126	106	147	129	154	144	127	133	121
Feb.	136	144	136	126	106	153	131	156	149	127	134	121
Mar.	137	142	137	126	107	173	132	157	165	128	137	123
Apr.	138	141	137	127	108	191	132	158	180	128	141	124
May	138	142	137	126	108	206	131	158	191	128	143	125
June 2/	138	146	134	126	108	202	130	158	188	126	142	125

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Canned weight.

2/ Preliminary.

The establishment of maximum price regulations on fresh fish and seafood, effective July 13 for sales by producers and wholesalers, and July 22 for sales at retail, has left apples and sweetpotatoes the only foods included in the Bureau of Labor Statistics index that are not subject to price control.

RETAIL PRICE CEILINGS ON FOODS, ISSUED JUNE 24-JULY 23, 1943

Date issued	Foods	Ceiling prices
6-24-43	Artichoke hearts in wine vinegar	Exempt from price control. Effective 6-30-43. (RSR 1, Am. 15) Formerly under GMPR.
6-28-43	Canned white potatoes	Potatoes canned in tin exempt from price control. Effective 6-28-43. (RSR 1, Am. 19) Formerly under GMPR.
7-2-43	Peanut butter sandwiches, macaroni and spaghetti dinners, chow mein noodles, soy milk vegetarian sandwich spread and dietary meats, rice farina cereal	Increases allowed manufacturers to reflect increased cost of raw materials, passed on to consumers through fixed markups at retail. Effective 7-9-43. (MPR 262, Am. 7)
7-5-43	Canned vegetables	Specific maximum prices at canner level for asparagus, mustard greens, and turnip greens; pricing formulas for Italian pear-shaped tomatoes, tomato catsup, chili sauce, tomato puree, tomato paste, tomato juice, tomato sauce, artichokes, bamboo sprouts, bean sprouts, celery, hominy, okra, onions, parsnips, peppers, pickles, pimientos, pumpkin, rhubarb, squash, turnips, and other greens. Increased prices to consumers will result through fixed markups at retail level. Effective 7-10-43. (MPR 309, Am. 9) Formerly under MPR 152.
7-7-43	Fresh milk in Baltimore area	Specific maximum prices for out-of-store and to-the-home sales. Effective 7-7-43. (SR 14, Am. 194) Formerly under GMPR.
7-8-43	Certain dry and perishable groceries	Fixed markups over net cost. Effective 8-5-43 for Groups 1 and 2 stores; 7-26-43 for Groups 3 and 4 stores. (MPR 422 and MPR 423) Formerly under RMPR 238, MPR 250, RMPR 256, and RMPR 268.
7-10-43	Fresh lettuce and cabbage for table use	Substantial rollback for sales to retailers. Reduction in consumers' prices reflected by fixed markup at retail level. Effective 7-20-43. (MPR 426) Formerly under MPR 376.

Date issued	Foods	Ceiling prices
7-10-43	Red sour cherries for table use	10 cents per pound, f.o.b. country shipping point, reflecting prices for consumers above 1942 prices. Effective 7-10-43. (MPR 426, Am. 1) Formerly not subject to price control.
7-13-43	Fresh berries for table use (7 types)	Sharp rollback on sales to retailers, which will be reflected at retail level. Effective 7-19-43. (MPR 426, Am. 2) Formerly not subject to price control.
7-14-43	Processed beans, macaroni products, and noodle products	Formulas for establishing maximum prices at manufacturer's level, resulting in increased price for consumers through fixed markup at retail. Effective 7-20-43. (MPR 427) Formerly under GMPR.
7-20-43	Fresh fish and seafood	Markup regulation at retail over specific maximum prices for sales at producer's and wholesaler's levels established in MPR 418. Effective 7-22-43. (MPR 439) Formerly not subject to price control.

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THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

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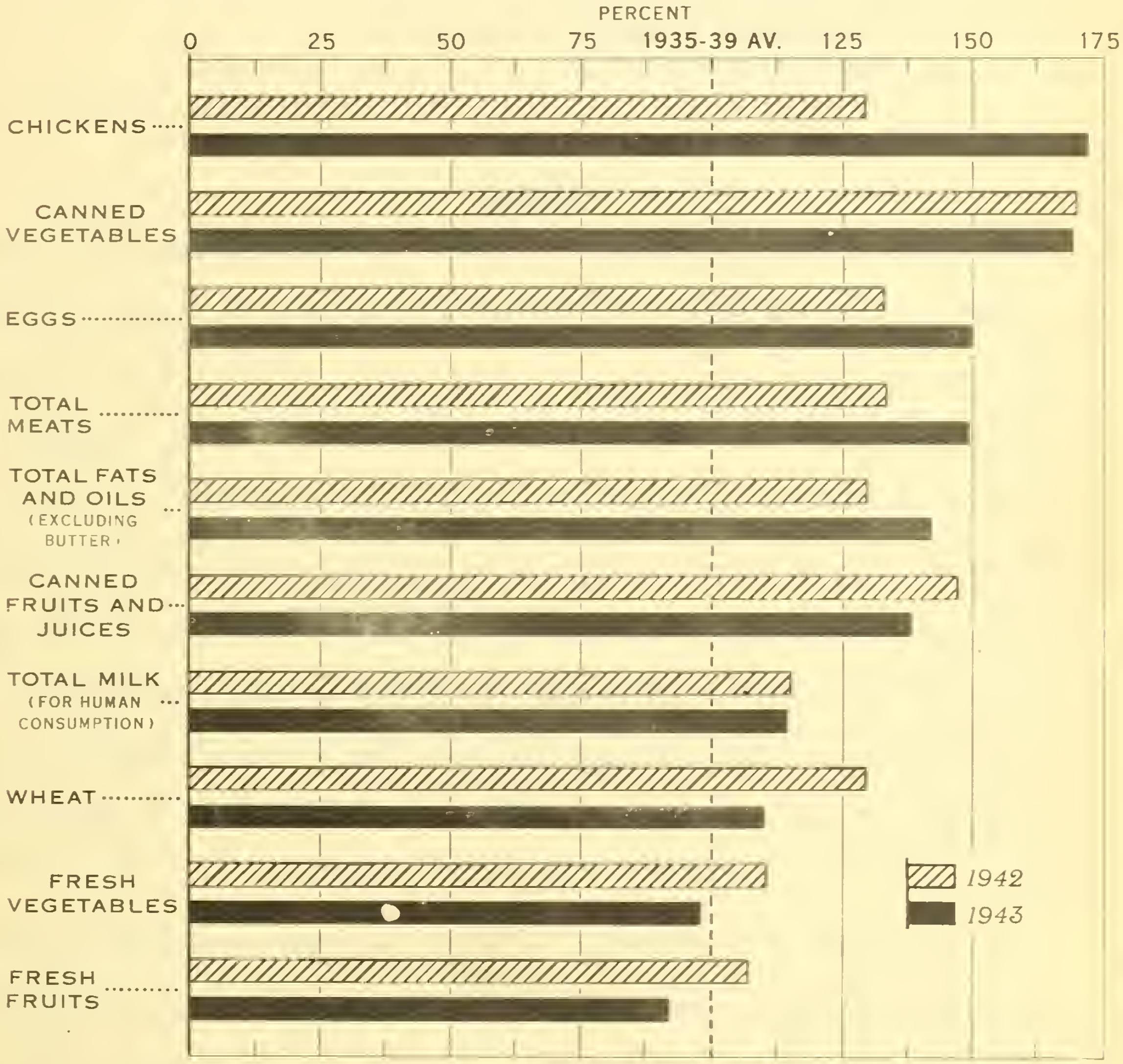
PRODUCTION OF MAJOR FOOD COMMODITIES, UNITED STATES: 1942 AND ESTIMATED 1943 AS A PERCENTAGE OF 1935-39 AVERAGE



U. S. DEPARTMENT OF AGRICULTURE NEG. 43244 BUREAU OF AGRICULTURAL ECONOMICS

Total food production this year is expected to exceed last year's record high production by 5 percent and will be 32 percent above the pre-war average, despite war-time restrictions and unfavorable weather. Substantial increases in livestock production will more than offset a 9 percent decline in food crops. With war requirements expected to absorb about one quarter of the total production, the per capita civilian supply for the year as a whole will be only slightly larger than the consumption in 1935-39.

THE NATIONAL FOOD SITUATION

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Summary

Prospects for food and feed crops in July were somewhat more favorable than in previous months and further improvements in August are indicated. On the basis of the August 1 crop report and the present outlook for livestock production for the remainder of the year, total agricultural food production in 1943 is estimated to be 5 percent larger than the record in 1942 and 32 percent above the average in 1935-39. The increase will come mainly from livestock production, which is expected to be 10 percent above 1942 and 38 percent above the average in 1935-39. Meat animals and poultry are responsible for the increases over last year in total livestock. The total output of dairy products is expected to remain about the same as in 1942.

As a result of unfavorable weather, the total production of food crops is expected to be 9 percent smaller than a year earlier though 13 percent above the average in 1935-39. Decreases are indicated for food grains, fruits, truck and sugar crops. The potato and dry edible bean crops, on the other hand, are expected to be larger than last year.

Revised estimates now indicate a total meat production in 1943 of 24 billion pounds -- by far the largest on record. The increase will come mainly from pork production, which is now estimated to be 20 to 25 percent above last year's. Federally inspected slaughter of hogs is continuing at a high level. Federally inspected cattle and calf slaughter, however, is substantially below last year. It is assumed that a greater than usual proportion of the available supply of cattle and calves is being diverted to non-federally inspected slaughter.

In view of the large 1943 crop of pigs raised in the spring of 1943 and the prospective tight feed situation, the production of pork is likely to be unusually heavy in the latter part of the year. Cattle slaughter may also show a substantial increase.

Marketings of chickens have greatly increased in recent weeks and supplies for the remainder of 1943 will be considerably larger than the previous record established in 1942. Egg production in July was 11 percent above the previous record for that month last year and is expected to continue larger than a year earlier throughout the remainder of 1943. Storage stocks of shell and frozen eggs on August 1 were the largest on record for any date. Supplies of eggs for civilians in the coming fall and winter are likely to be larger than in the corresponding period of 1942 although possibly short of demand at ceiling prices.

While milk production in the first half of the year was running slightly ahead of last year's, it is expected to decline relative to a year earlier in the last half of 1943. The decrease in production will affect the output of manufactured products but the consumption of fluid milk is expected to continue at a high level. Manufacturers' stocks of evaporated milk and butter stocks (including Government holdings) on August 1 were of record size. Stocks of cheese also have been increasing by more than the usual seasonal amount, but are still below last year's level. These will be needed to fill essential requirements during the winter months. In order to maintain civilian supplies under the ration program, the War Food Administration decreased the percentage of butter and cheese to be set aside by manufacturers for the months August, September, and October.

The August 1 crop report indicated an aggregate deciduous fruit and grape production about 17 percent below last season's and 12 percent below the 10-year 1932-41 average. Citrus fruit production, on the other hand, may be about as large in 1943-44 as in 1942-43. Production of commercial truck crops for fresh consumption in the coming weeks is expected to be 5 percent lower than in 1942. Truck crops for processing in 1943 are expected to be the same as in 1942. The crops of potatoes and sweetpotatoes are estimated to be 19 and 24 percent, respectively, larger than in 1942. In spite of large war requirements, civilian supplies of potatoes for the 1943-44 marketing season should be somewhat larger than in 1942-43.

The total wheat crop is now indicated at 835 million bushels -- 44 million bushels above the July 1 estimate. A crop of this size is 96 million bushels above the 1932-41 average but 146 million bushels below the crop of last year. The indicated production, together with a 618 million bushel carry-over on July 1, will be sufficient to meet essential requirements. Improvement in the corn crop was also indicated on August 1. With better prospects for corn and wheat, the feed supply per animal unit for 1943-44 may be about the same as in 1935-39 but 15 percent smaller than last season.

-- August 25, 1943

COMMODITY REVIEWS

Meats

Revised estimates now indicate a total meat production in 1943 of 24 billion pounds -- by far the largest on record. The increase will come mainly from pork production which is expected to be 20 to 25 percent above 1942. Beef and veal production may be a little larger than in 1942 but lamb and mutton may be the same or somewhat smaller.

Federally inspected slaughter of hogs is continuing at a high level and in July amounted to 5.4 million hogs. As a result of the prospective tight feed situation, the number of hogs slaughtered out of the record crop this spring is expected to be unusually heavy in the late months of 1943.

Cattle slaughter under Federal inspection has advanced from the low level in June but is still below last year. Calf slaughter remains at a low level. Part of the decrease in federally inspected slaughter is probably accounted for by diversion of an increased proportion of available supplies of cattle and calves to other types of slaughter.

The supplies of grain-fed cattle coming to market in early fall appear to be about the same as a year earlier, and cattle numbers in the Western States are at a high level in relation to the present feed supply. This points to a larger than seasonal rise in federally inspected slaughter this fall from the present low level.

The 1943 lamb crop has been estimated at 31.1 million head. This is 1.5 million head below last year but 900,000 head larger than the 1932-41 average. Lamb slaughter in federally inspected plants appears to be running the same as last year while ewe slaughter is estimated to be about 25 percent heavier than in 1942.

Cold-storage holdings of pork on August 1 were 542 million pounds -- 108 million pounds larger than on the same date last year. Storage stocks of lard and rendered pork fat on August 1 were 239 million pounds compared with 98 million pounds on August 1 last year.

Since the Government has adequate inventories, the War Food Administration announced purchases of pork and lard would be curtailed during the next few weeks. Pork quotas for local and commercial slaughterers were also raised to maintain civilian supplies at about the current level.

On August 15, the War Food Administration inaugurated a new over-all system of licensing all livestock slaughterers except farmers. The new licensing program is designed to simplify and speed up the operations of the war meat program and provides an opportunity for nonfederally inspected plants to increase their slaughter by supplying meat to Government agencies.

Poultry and Eggs

Marketings of chickens have greatly increased in recent weeks and in mid-August supplies were about ample to meet demand at prevailing prices. Prices of most chickens were a little below the maximum levels established by the Office of Price Administration. Supplies of chicken in the remainder of 1943 will be considerably larger than the previous record established in 1942. Prices, however, are likely to be at or close to ceiling levels which are slightly higher than those that prevailed in the second half of 1942.

Supplies of turkey for civilians this year, though above average, may be slightly smaller than a year earlier since production is about the same as last year and larger quantities will be taken by the military forces. Demand for turkey this season, therefore, is expected to exceed supplies at ceiling prices by a greater margin than last season. F.D.O. 71 as amended in mid-August provides that no live or dressed turkeys may be sold for uses other than by the Government until 10 million pounds have been purchased for our overseas forces. It is expected that this emergency program will be completed by early October.

Egg production in July was 11 percent above the previous record for that month in 1942 but about one-third smaller than the April output, the seasonal peak for the year. In recent weeks the demand for eggs has been exceeding market supplies at ceiling prices even though such prices are being increased seasonally.

Egg production will decline until November as the average rate of production per bird declines seasonally, but is very likely to continue larger than a year earlier through the remainder of 1943. Storage stocks of shell and frozen eggs on August 1, the usual seasonal peak, were the largest on record for any date. The quantity of present and prospective supplies of eggs used for drying and other non-civilian uses in the coming fall and winter will be considerably larger than a year earlier. Supplies for civilians, however, are likely to be larger than in the corresponding period of 1942-43 though probably short of demand at ceiling prices. The demand is most likely to exceed supplies of eggs in areas that are deficient in fall and winter egg production.

Dairy Products

In accordance with its announced policy of adjusting the quantities of dairy products reserved for Government purchase to seasonal production, the War Food Administration decreased the percentage of butter to be set aside by manufacturers from 50 to 30 percent and cheese from 70 to 60 percent in August and September, and to 30 and 50 percent, for the respective products, in October. Under this order, approximately 300 million pounds of butter out of an estimated 440 million pound-production are expected to be available to civilians during these months. In addition, civilians probably will also have about 90 million pounds of farm butter. Out of an estimated production of 200 million pounds of cheddar cheese, civilians are expected to have available approximately 90 million pounds. In addition, they will have about 35 million pounds of whole milk cheese other than cheddar. A further reduction in the set-aside percentage is expected during the winter months. With the new percentages, amounts left for civilian consumption will be in line with the yearly allocation under the rationing program.

Supplies of butter for civilian consumption continued short of demand under the rationing program during July and August and most stores in Eastern areas have been limiting sales to customers. To assist in adjusting the demand to the limited supply, the value for butter was increased from 8 points per pound to 10 points, effective August 1. Supplies of cheddar cheese were acutely short on most markets and of brick, and foreign types were moderately short. Supplies of soft types of cheese appeared ample to meet the demand under the ration program. To encourage the use of whey products, varieties of cheese made from whey were removed from rationing, effective August 7. Cheeses made from milk other than cow's milk also were made ration-free. These cheeses are of minor importance but have been difficult to move under the ration program.

Manufacturers' stocks of evaporated milk increased very rapidly during June and on July 1 were by far the largest on record for that date. Total butter stocks, including Government holdings also have been increasing rapidly and on August 1 were at a record level. Stocks of cheese have been increasing by more than the usual seasonal amount but still are below last year's level. These accumulated supplies will be needed to fill essential requirements during the winter months, when production is down seasonally.

Milk production in the first half of 1943 was at an annual rate of about 119 billion pounds. However, milk production in the fourth quarter of 1943 is expected to be reduced to an annual rate of about 115 billion pounds. Sales of fluid milk are likely to continue to increase unless restricted in some manner. With sales of fluid milk taking an increasing proportion of a decreasing milk supply, production of most manufactured dairy products is expected to decline. Fluid milk sales for 1943 as a whole may average over 10 percent larger than last year. Production of American cheese, evaporated milk and dried skim milk, on the other hand, is expected to be about 20 percent smaller this year than in 1942, but the output of butter may be almost as large as in 1942.

Fats and Oils

Supplies of fats and oils other than butter continued plentiful in retail stores in July and August. In early July the rationing point value for margarine was lowered from 5 to 4 as a result of difficulty experienced in moving margarine into consumption to compensate in part for the shortage of butter. On August 1 the point value for butter was raised from 8 to 10 to adjust the demand to the supply. Cold storage stocks of lard on August 1, totaling 279 million pounds, were 141 million pounds larger than a year earlier. However, Government holdings accounted for almost all of the increase. Disappearance of lard for civilian consumption was approximately 15 percent smaller in April-June (the first quarter under rationing) than in January-March. Factory disappearance of shortening for civilian use was 5 percent less in April-June than in the first quarter of the year and was 10 percent under the April-June average for 1940 and 1941.

Fruits

Prospects August 1 indicated an aggregate deciduous tree-fruit and grape production approximately 17 percent below last season's and 12 percent below the 10-year (1932-41) average. Prune and grape crops are expected to be larger than in 1942 and the fig crop about the same as a year ago. Indicated production of all other major deciduous fruits is far smaller than last season's. A summary of indicated 1943 production of five major deciduous fruits in comparison with 1942 and average crops follows.

Fruits: Indicated production of selected fruits in 1943, with comparisons

(On basis of August crop report)

Item	Unit	Indicated 1943	Percentage of 1942	Percentage of 1932-41 average
			Percent	Percent
Apples, commercial crop	Bu.	93,135,000	72	1/ 76
Peaches	"	42,450,000	64	77
Pears	"	23,882,000	78	85
Prunes, fresh (3 States) 2/	Ton	124,500	110	85
Prunes, dried, California (dry basis)	"	191,000	112	98
Grapes, total, all States	"	2,671,150	111	113
Grapes, California, total	"	2,484,000	115	117
Wine varieties	"	512,000	108	100
Table varieties	"	459,000	112	121
Raisin varieties	"	1,513,000	118	123

1/ Comparison with 1934-41 average for apples.
2/ Total production in Idaho, Washington, and Oregon on a fresh basis, some of the Washington and Oregon prunes later being dried.

Commercial apple production, normally constituting about one-fifth of the fresh fruit supply, is expected to be smaller this season than last in all important apple States except California. The crop in the South Atlantic States may be only about one-half that of a year ago. Production in the North Central States is estimated at 65 percent of last year's. Because of the large California crop, production in the Western States may be only about 9 percent below last season's. Crops of all major varieties except Wealthys are expected to be in materially smaller supply this season than last, with the greatest decrease in apples of the Baldwin, Delicious, and Winesap varieties. Demand is certain to far exceed supply.

The grape crop, now moving to market in sizeable volume, is expected to be about 11 percent larger this season than last. Production in California is indicated at 15 percent above last year's, but production in other States is expected to be smaller. Despite a larger crop, shipments of grapes into fresh market channels have been much smaller thus far this season than last -- primarily because of an order in effect in eight California counties prohibiting the use of raisin variety grapes for any other purpose than raisin production.

Peaches continue in far smaller supply than a year ago, the total crop now being estimated at about two-thirds of last year's. The extremely short crop in the Eastern States (primarily fresh market peaches) has been reflected by greatly reduced shipments of peaches for fresh use. Carlot shipments through August 7 this season totaled less than one-half those for the same period a year ago.

Pears, thus far this season, have been in more abundant supply than in 1942. The California crop, providing early marketings, is estimated to be about one-sixth larger this year than last. Pear production in the other States, however, is expected to be only about three-fifths that of 1942. As the season advances, pear supplies are expected to be far smaller than last year.

Citrus production in contrast to deciduous may be about as large as in 1943-44 as in 1942-43. August 1 conditions this year compared with last indicate larger crops of California oranges, grapefruit, and lemons, but smaller Florida orange and Texas and Florida grapefruit crops. Providing growing conditions for citrus remain favorable, the total fruit supply during the 1943-44 marketing season, citrus and deciduous, probably will be about 11 percent smaller than in 1942-43.

Truck Crops

The fresh market supply of commercial truck crops during the next few weeks is expected to be about 5 percent smaller than in 1942 but slightly above the 10-year (1932-41) average. Materially larger carrot, beet, and tomato crops and somewhat larger snap bean, cabbage, and eggplant crops probably will be more than offset by a smaller production of celery, cucumbers, cantaloups, cauliflower, sweet corn, lettuce, lima beans, onions, peppers, spinach, and watermelons. Celery, cucumber, cantaloup, and watermelon production is expected to continue far below last year's. Supplies of lima beans, cauliflower, onions, and peppers during the next few weeks, although smaller than last season's, should continue more plentiful than in July.

The aggregate production of truck crops for processing is expected to be about the same as in 1942. Snap bean and green pea processing crops are indicated at 7 percent and 8 percent, respectively, above last year's, and sweet corn and spinach about the same as a year ago. The supply of tomatoes for processing may be about 2 percent smaller than in 1942. An increase is indicated for beets and carrots for processing, but a smaller tonnage for other minor vegetables.

Potatoes and Sweetpotatoes

A crop of 443 million bushels of potatoes now is indicated for 1943 -- 19 percent larger than in 1942 and 2 percent above July 1 indications. Production in the 30 late States, providing most of the marketings from September to May, is expected to be almost one-fifth larger this year than last. Supplies during the next few weeks should continue plentiful; and civilian supplies for the 1943-44 marketing season as a whole, despite increased noncivilian requirements, should be larger than in 1942-43.

August 1 prospects for sweetpotatoes indicate a crop of about 81 million bushels, 24 percent above last year's. Shipments of new sweetpotatoes from Florida, Alabama, and Louisiana have reached sizeable volume, and supplies should be plentiful by early September.

Wheat, Rye, and Rice

A total wheat crop of 835 million bushels -- 44 million bushels above the July 1 estimate -- was indicated August 1. This is 96 million bushels above the 1932-41 average but 146 million bushels below the large crop of last year. A crop of this size together with a 618 million bushel carry-over on July 1 will make a total prospective domestic supply of 1,453 million bushels. Of this total supply, approximately 535 million bushels are expected to be used for food in 1943-44, 80 million bushels for seed, 150 million bushels for alcohol, 400 million bushels for feed, and 40 million bushels for exports and shipments. Since a larger quantity of wheat than was previously estimated probably will be used for feed, the carry-over on June 30, 1944 is expected to total about 250 million bushels. Wheat imports may be expected to supplement the quantity of domestic wheat for feed but the amount imported may continue to be limited by the tight shipping situation.

The rye production, indicated August 1 at 33.3 million bushels, was almost unchanged from a month earlier. With stocks of rye at the beginning of the 1943-44 year amounting to 42.4 million bushels, the total domestic supply for 1943-44 will be 76 million bushels, compared with 88 million bushels in 1942-43, and an average of 57 million bushels in 1934-41. Since only about 10 million bushels of rye are needed for food and 8 for seed, large quantities remain available for animal feed and production of industrial alcohol.

The rice production, indicated August 1 at 70.8 million bushels, was about 1 million bushels below the estimate of a month earlier. The indicated production this year is 7 percent above the record crop in 1942 and 50 percent above the 1932-41 average. A crop of this size is expected to cover prospective requirements and leave a moderate carry-over at the end of the 1943-44 marketing year.

Feed Situation

Prospects for the 1943 corn crop improved during July and a crop of 2,875 million bushels was indicated on August 1 which is 168 million bushels larger than was indicated July 1. A larger wheat production was also indicated on August 1 so that wheat available for feed during 1943-44 may total about 400 million bushels. Prospects for the oats crop, on the other hand, declined 4 percent. Altogether the total supply of feed grains, including wheat and rye for feeding is expected to be about 143 million tons, 4 percent larger than that indicated July 1, but 7 percent smaller than the 1942-43 supply. This would be the second largest supply on record and 38 percent above the 1935-39 average.

Supplies of the 4 principal oil cakes and meals available for livestock are now expected to total about 6,375,000 tons or slightly larger than in 1942-43. Changes in the wheat for alcohol program indicate a smaller production of wheat millfeeds than was expected earlier. Total supplies of the principal vegetable byproduct feeds, therefore, are expected to be only about the same as in 1942-43 when the supply available for feeding totaled about 13.9 million tons.

Assuming about 10 percent more livestock animal units in 1943-44 than in 1942-43, the feed supply per animal unit for 1943-44 will be about 15 percent smaller than last year, and about the same as the 1935-39 average. If stocks of feed grains carried over into 1944-45 are reduced to a minimum, disappearance of feed during the crop year 1943-44 would be about as large as in 1942-43, but 10 percent smaller than last year per animal unit.

RETAIL FOOD COSTS, JULY 1943

From mid-June to mid-July retail prices of all foods combined declined 2.0 percent, compared with a decrease in total cost of living of 0.8 percent, according to the Bureau of Labor Statistics indexes. Prices in July 1943 show an increase of 11.6 percent over July 1942, or an average increase of 1.0 percent a month.

The rollback regulation on prices of meats, effective June 21 and July 5, and the average decline in prices of fresh fruits and vegetables account for the decrease in prices of all foods from June to July. These reductions were partly offset by the continued rise in prices of fresh fish and the seasonal increase in egg prices.

Changes in prices of fresh fruits and vegetables were partly seasonal. The more-than-seasonal increase in the price of oranges was due to an unusually large proportion of Florida oranges on the market in June resulting from a small California navel orange crop, and a more nearly normal proportion of Florida and California oranges in July. Prices of green beans and carrots failed to show the usual seasonal decline because of plentiful supplies in June and a dropping off in July. On the other hand, increased supplies of cabbage, lettuce, and potatoes over unusually short supplies in June resulted in more than the usual seasonal price decline from June to July. The supply of onions continued short with prices probably at ceiling levels. The scarcity of white potatoes early in the season and the use of sweetpotatoes as a substitute caused sweetpotatoes to reach a peak earlier than usual, and, although the price declined somewhat from June to July, it was maintained at a relatively high level.

Meats, eggs, and fresh fruits and vegetables: Percentage change in retail prices, United States, selected periods

Commodity	July 1941-July 1943	July 1942-July 1943	June-July 1943
	Percent	Percent	Percent
Meats:			
Beef and veal	+ 10.7	- 2.8	- 8.5
Pork	+ 8.7	- 5.6	- 8.1
Lamb	+ 22.4	+ 2.6	- 4.3
Chickens	+ 40.1	+ 16.5	- .5
Fish, fresh and canned	+ 73.0	+ 29.2	+ 3.6
Eggs	+ 33.9	+ 18.0	+ 5.1
Fresh fruits:			
Apples	+134.5	+ 60.0	- 8.7
Bananas	+ 64.8	+ 12.5	0
Oranges	+ 62.4	+ 30.9	+ 9.6
Fresh vegetables:			
Beans, green	+ 66.0	+ 54.8	+ 1.9
Cabbage	+ 58.5	+ 41.3	-35.0
Carrots	+ 56.6	+ 18.6	0
Lettuce	+ 35.0	+ 8.0	-11.2
Onions	+ 27.5	+ 79.6	- 2.2
Potatoes	+ 71.1	+ 21.4	-15.2
Spinach	+107.1	+ 54.3	+42.2
Sweetpotatoes	+164.6	+135.6	- 5.0

Prices of apples and sweetpotatoes are still not subject to price control. The maximum price regulations affecting fresh fish and seafood at retail and the rollback regulation on cabbage and lettuce did not become effective until July 20.

SUBSIDIES

A 10 percent reduction in retail price ceilings for butter became effective on June 10. In order that this rollback would not decrease prices received by farmers, subsidy payments of 5 cents per pound are being made by Reconstruction Finance Corporation to any person who manufactures 1,000 or more pounds of butter in any one establishment in any calendar month.

The retail price of butter as reported by the Bureau of Labor Statistics dropped 5.1 cents per pound from mid-May to mid-June. By mid-July it had recovered 0.6 cents of the previous drop and now stands at 4-1/2 cents below the mid-May price.

From mid-May to mid-June the farm price of butterfat decreased 1.4 cents per pound and held steady from mid-June to mid-July. It should be pointed out, however, that butterfat prices had been above the usual relationship to butter prices for some months.

The reduction of 1 cent in farm price of butter from mid-May to mid-June and 0.3 cents from mid-June to mid-July were smaller than might have been expected since because of the size of their production very few of the producers are eligible for subsidy payments.

A reduction in retail ceiling prices for meat averaging about 10 percent became effective June 21 except for cured and processed pork, for which the reduction became effective July 5. Subsidy payments are being made to processors based on the live weight of livestock slaughter. According to the Office of Price Administration, these payments are expected to be the equivalent of approximately 2 cents per pound on the weight of the dressed carcass. The reduction in the retail prices of meat reported by the Bureau of Labor Statistics from mid-June to mid-July for beef ranged from 2.6 cents per pound for chuck roast to 4.7 cents per pound for round steak. For pork, from 1.6 cents for salt pork to 5.6 cents for sliced ham. For lamb, 1.3 cents for leg and 2.8 cents for rib chops. For veal, 2.5 cents for rolled and boned roast, and 4.4 cents for cutlets.

Prices received by farmers for meat animals declined 40 cents per hundred for hogs, 30 cents per hundred for veal calves, and 20 cents per hundred for beef cattle and lambs in the same period. This decline in farm prices from mid-June to mid-July is not necessarily a permanent one. Recently market prices of hogs and some grades of cattle have advanced and are now somewhat above the mid-July level.

THE PRODUCTION AND CONSUMPTION OF MEAT FROM 1909 THROUGH 1940

The apparent per capita consumption of all meats has decreased gradually during the years 1909 through 1940. The annual average per capita consumption of all meats in 1910-14 was more than 145 pounds but declined to 127 pounds in 1935-39. However, in 1941 and 1942 consumption returned to approximately the earlier level.

Domestic production of meat in this period has been the major source of our total yearly supply, imports constituting less than 1 percent, and cold-storage holdings (January 1 stocks) about 3 percent. Of the total yearly supply, approximately 93 percent went into domestic consumption.

Yearly exports and shipments from the United States averaged approximately 4 percent. The average annual exports and shipments during this period were about 700 million pounds and imports were less than 150 million pounds. Imports increased more than threefold between the two periods 1910-14 and 1935-39 while exports and shipments declined about 65 percent.

Beef and Veal

The apparent per capita consumption of beef and veal in the United States declined somewhat from 1910 to 1940 (figure 2). The average annual per capita consumption in 1910-14 was over 72 pounds while in 1935-39 it had decreased to about 63 pounds. Consumption of beef and veal has tended to follow a cyclical movement (commonly referred to as the cattle cycle with a duration usually lasting from 14 to 16 years) and also seems to have varied inversely with the consumption of pork. During the periods 1909-13, 1917-18, and 1934-38 the per capita consumptions of beef and veal were at cycle peaks. During these same years the per capita consumptions of pork were at the trough of their cycle.

The average annual per capita consumption of beef and veal was almost 72 pounds from 1909 through 1918, reaching over 81 pounds in 1909 which is the largest yearly per capita consumption of any of the 32 years included in this study. From 1919 through 1927 consumption fluctuated between 62 pounds and 69 pounds, averaging approximately 67 pounds. In the ensuing 6-year period, 1928-33, the average annual per capita consumption had dropped to less than 56 pounds. By the fall of 1933 unseasonally heavy slaughterings of cattle and calves had begun. This was mainly due to low prices farmers were receiving for their cattle and calves and the shortage of feed and pasture caused by a moderate drought during the spring and summer of 1933. These heavy slaughterings are reflected in the increased consumption of beef and veal from 1933 to 1934. The purchase of cattle and calves by the Government under the emergency relief program during 1934 accounted for a total per capita consumption of beef and veal of almost 10 pounds.

The average annual total supply of beef and veal available for consumption from 1909 through 1940 was about 7.8 billion pounds, of which over 97 percent was produced in the United States. Imports increased from an average annual quantity of approximately 66 million pounds in 1910-14 to over 214 million pounds in 1935-39. Exports and shipments from the United States during these same periods decreased. In the earlier period the average annual quantity exported and shipped was about 113 million pounds while in the latter period it was only about 52 million pounds.

Pork (Excluding Lard)

Pork consumption showed a slight upward trend up to 1934. However, the heavy slaughtering of pigs and sows under the emergency Government purchase program in the summer and fall of 1933 and the extreme 1934 drought reduced the number of pigs and hogs available for slaughter in the following 2 or 3 years causing the consumption of pork to drop sharply. The average per capita consumption of pork in 1935-39 was 56 pounds, approximately 10 pounds less than in 1910-14. By 1940 it had risen to almost 73 pounds.

The per capita consumption of pork has followed a cyclical pattern of a duration shorter than the beef and veal cycle. The usual length of the hog production cycle tends to be between 5 and 7 years.

The quantity of pork imported into the United States from 1909 to 1940 has been increasing, but it has always been less than 2 percent of the total supply available for consumption. The average annual imports of pork in 1910-14 were about 7 million pounds but increased to 48 million pounds by 1935-39. Exports and shipments of pork from the United States have been decreasing over the same period of years, averaging 431 million pounds annually in the earlier period and 143 million pounds in the latter period.

Lamb and Mutton

The consumption of lamb and mutton is a comparatively small part of our total meat consumption (figure 2). It represents, on the average, less than 10 percent of the total per capita consumption of all meats from 1909 to 1940, averaging slightly more than 6 pounds per capita. During this period the per capita consumption ranged from a low of 4.5 pounds in 1917 to a high of 7.7 pounds in 1912.

Annual imports of lamb and mutton into the United States in 1910-14 averaged over 4 million pounds compared with less than 100,000 pounds during the 1935-39 period. Exports and shipments averaged about 4 million pounds in 1910-14 and 2 million pounds in 1935-39, and for most years were less than 1 percent of the total supply.

APPARENT PER CAPITA CONSUMPTION OF ALL MEATS, BY KIND, UNITED STATES, 1909-40

(DRESSED WEIGHT BASIS)

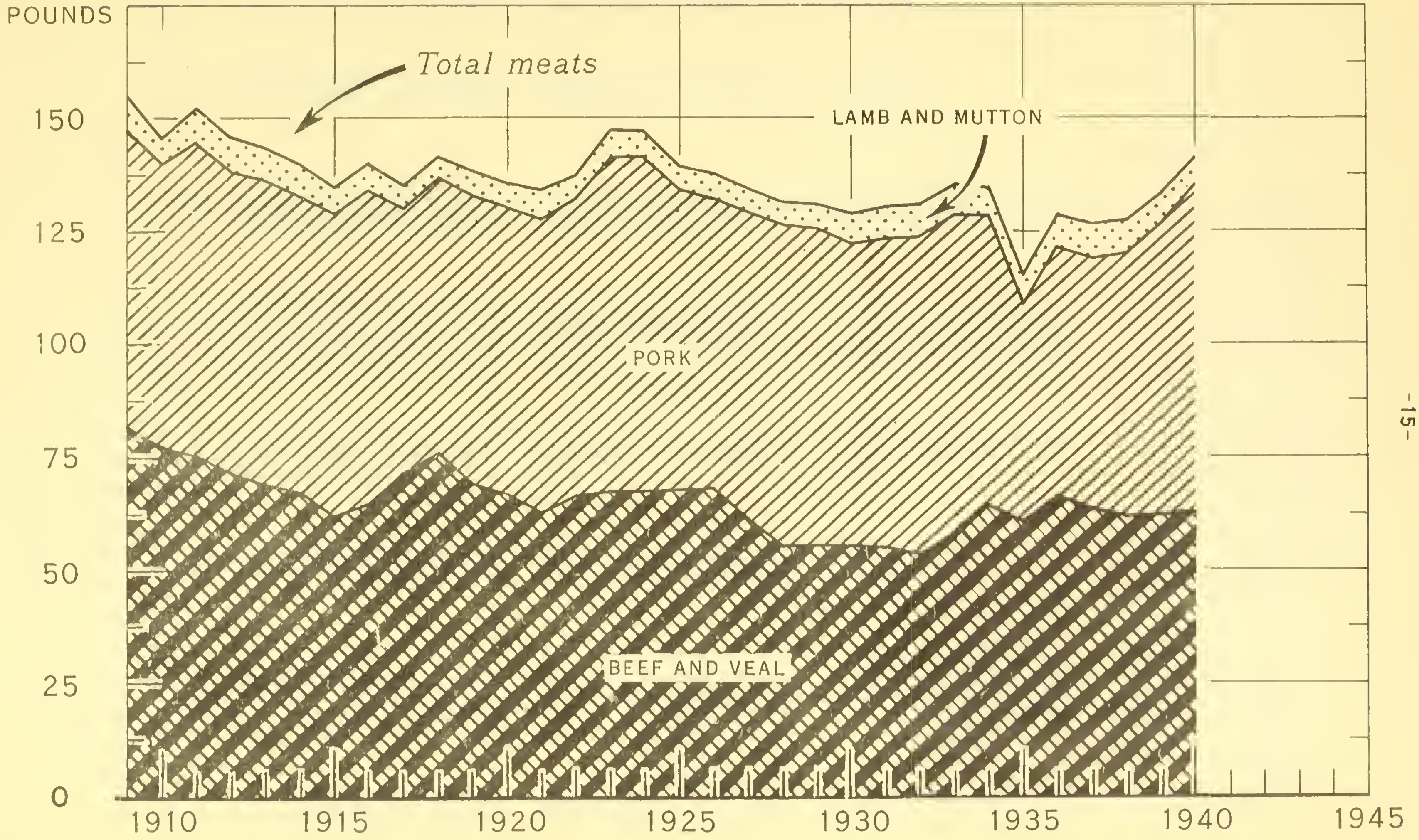

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FIGURE 2

Supply and distribution of all meats, calendar years, 1909-40 1/

Year	Production	Stocks Jan. 1	Imports	Total supply	Exports and shipments	Stocks Dec. 31	Apparent consumption: Total	Apparent consumption: Per capita
	Total meats (dressed weight)							
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
1909	14,740		2	14,742	699		14,043	154.9
1910	13,998		2	14,000	474		13,526	146.5
1911	14,869		2	14,871	607		14,264	152.3
1912	14,453		4	14,457	555		13,902	146.2
1913	14,475		44	14,519	552		13,967	144.8
1914	14,103		328	14,431	554		13,877	141.6
1915	14,886		131	15,017	1,455		13,562	136.6
1916	15,907	574	39	16,520	1,424	804	14,292	141.8
1917	15,501	804	61	16,366	1,452	926	13,988	136.8
1918	17,341	926	381	18,648	2,766	1,071	14,811	143.0
1919	16,642	1,071	95	17,808	2,305	907	14,596	138.9
1920	15,334	907	166	16,407	1,172	745	14,490	136.0
1921	15,178	745	60	15,983	938	506	14,539	134.3
1922	16,138	506	52	16,696	843	691	15,162	137.9
1923	17,708	691	40	18,439	1,130	817	16,492	147.8
1924	17,595	817	45	18,457	855	793	16,809	148.5
1925	16,598	793	49	17,440	661	559	16,220	141.2
1926	16,649	559	92	17,300	523	579	16,198	139.0
1927	16,321	579	167	17,067	415	604	16,048	135.8
1928	16,248	604	206	17,058	423	774	15,861	132.3
1929	16,147	774	264	17,185	472	730	15,983	131.5
1930	16,016	730	140	16,886	401	601	15,884	129.0
1931	16,456	601	57	17,114	284	618	16,212	130.5
1932	16,418	618	69	17,105	208	537	16,360	131.0
1933	17,317	537	107	17,961	243	713	17,005	135.2
1934	18,830	713	120	19,663	269	833	18,561	146.6
1935	14,423	833	212	15,468	191	436	14,841	116.5
1936	16,762	436	271	17,469	174	872	16,423	127.9
1937	15,709	872	307	16,888	167	463	16,258	125.8
1938	16,479	463	257	17,199	207	492	16,500	127.2
1939	17,534	492	265	18,291	247	551	17,493	133.6
1940	18,995	551	175	19,721	221	768	18,732	142.0

Continued -

Supply and distribution of all meats, calendar years, 1909-40 1/ - Continued

Beef and veal (dressed weight)

Year	Production	Stocks Jan. 1	Imports	Total supply	Exports and shipments	Stocks Dec. 31	Apparent consumption Total	Apparent consumption Per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
1909	7,575		1	7,576	203		7,373	81.3
1910	7,314		1	7,315	140		7,175	77.7
1911	7,215		1	7,216	124		7,092	75.7
1912	6,896		3	6,899	84		6,815	71.7
1913	6,790		42	6,832	67		6,765	70.1
1914	6,586		280	6,866	151		6,715	68.5
1915	6,665		113	6,778	518		6,260	63.1
1916	7,115	148	22	7,285	385	240	6,660	66.1
1917	7,983	240	52	8,275	488	355	7,432	72.7
1918	8,486	355	376	9,217	954	335	7,928	76.6
1919	7,575	335	81	7,991	406	299	7,286	69.3
1920	7,148	299	61	7,508	219	143	7,146	67.1
1921	6,842	143	34	7,019	85	85	6,849	63.3
1922	7,440	85	39	7,564	88	116	7,360	67.0
1923	7,637	116	33	7,786	90	106	7,590	68.0
1924	7,849	106	36	7,991	86	143	7,762	68.5
1925	7,867	143	37	8,047	81	85	7,881	68.6
1926	8,044	85	76	8,205	71	101	8,033	68.9
1927	7,262	101	142	7,505	69	77	7,359	62.3
1928	6,544	77	190	6,811	59	99	6,653	55.5
1929	6,632	99	251	6,982	63	104	6,815	56.1
1930	6,709	104	136	6,949	59	75	6,815	55.3
1931	6,832	75	53	6,960	58	53	6,849	55.1
1932	6,611	53	63	6,727	32	43	6,652	53.3
1933	7,331	43	104	7,478	39	79	7,360	58.5
1934	2/ 9,485	79	118	9,682	56	141	9,485	74.9
1935	2/ 7,627	141	201	7,969	53	106	7,810	61.3
1936	8,433	106	227	8,766	54	194	8,518	66.3
1937	7,906	194	227	8,327	51	61	8,215	63.6
1938	7,902	61	200	8,163	53	58	8,052	62.1
1939	8,002	58	220	8,280	52	77	8,151	62.3
1940	8,160	77	168	8,405	55	107	8,243	62.5

Continued -

Supply and distribution of all meats, calendar years, 1909-40 [1]

Lamb and mutton (dressed weight)

Year	Production	Stocks Jan. 1	Imports	Total supply	Exports and shipments	Stocks Dec. 31	Apparent consumption Total	Apparent consumption Per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
1909	608		---	608	2		606	6.7
1910	597		---	597	2		595	6.4
1911	693		---	693	3		690	7.4
1912	735		---	735	5		730	7.7
1913	706		1	707	6		701	7.3
1914	693		20	713	5		708	7.2
1915	605		12	617	5		612	6.2
1916	585	5	16	606	6	5	595	5.9
1917	463	5	6	474	4	7	463	4.5
1918	506	7	1	514	2	13	499	4.8
1919	590	13	8	611	3	10	598	5.7
1920	538	10	103	651	4	68	579	5.4
1921	639	68	25	732	65	6	661	6.1
1922	553	6	12	571	2	5	564	5.1
1923	588	5	5	598	3	2	593	5.3
1924	597	2	2	601	2	3	596	5.3
1925	603	3	3	609	2	2	605	5.3
1926	639	2	3	644	2	5	637	5.5
1927	629	5	3	637	2	4	631	5.3
1928	663	4	3	670	1	5	664	5.5
1929	682	5	4	691	1	5	685	5.6
1930	825	5	1	831	2	5	824	6.7
1931	885	5	---	890	2	2	886	7.1
1932	884	2	---	886	1	3	882	7.1
1933	852	3	---	855	2	4	849	6.8
1934	[3]821	4	---	825	2	4	819	6.5
1935	877	4	---	881	2	3	876	6.9
1936	855	3	---	858	2	11	845	6.6
1937	852	11	---	863	2	3	858	6.6
1938	897	3	---	900	2	4	894	6.9
1939	872	4	---	876	3	5	868	6.6
1940	877	5	---	882	3	5	874	6.6

Continued -

Supply and distribution of all meats, calendar years, 1909-40 1/ - Continued

Pork, excluding lard (dressed weight)

Year	Production	Stocks Jan. 1	Imports	Total supply	Exports and shipments	Stocks Dec. 31	Apparent consumption	
							Total	Per capita
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Lb.
1909	6,557		1	6,558	494		6,064	66.9
1910	6,087		1	6,088	332		5,756	62.4
1911	6,961		1	6,962	480		6,482	69.2
1912	6,822		1	6,823	466		6,357	66.8
1913	6,979		1	6,980	479		6,501	67.4
1914	6,824		28	6,852	398		6,454	65.9
1915	7,616		6	7,622	932		6,690	67.3
1916	8,207	421	1	8,629	1,033	559	7,037	69.8
1917	7,055	559	3	7,617	960	564	6,093	59.6
1918	8,349	564	4	8,917	1,810	723	6,384	61.6
1919	8,477	723	6	9,206	1,896	598	6,712	63.9
1920	7,648	598	2	8,248	949	534	6,765	63.5
1921	7,697	534	1	8,232	788	415	7,029	64.9
1922	8,145	415	1	8,561	753	570	7,238	65.9
1923	9,483	570	2	10,055	1,037	709	8,309	74.5
1924	9,149	709	7	9,865	767	647	8,451	74.7
1925	8,128	647	9	8,784	578	472	7,734	67.3
1926	7,966	472	13	8,451	450	473	7,528	64.6
1927	8,430	473	22	8,925	344	523	8,058	68.2
1928	9,041	523	13	9,577	363	670	8,544	71.3
1929	8,833	670	9	9,512	408	621	8,483	69.8
1930	8,482	621	3	9,106	340	521	8,245	67.0
1931	8,739	521	4	9,264	224	563	8,477	68.3
1932	8,923	563	6	9,492	175	491	8,826	70.6
1933	9,134	491	3	9,628	202	630	8,796	69.9
1934	4/8,524	630	2	9,156	211	688	8,257	65.2
1935	5,919	688	11	6,618	136	327	6,155	48.3
1936	7,474	327	45	7,845	118	667	7,060	55.0
1937	6,951	667	80	7,698	114	399	7,185	55.6
1938	7,680	399	57	8,136	152	430	7,554	58.2
1939	8,660	430	45	9,135	192	469	8,474	64.7
1940	9,958	469	7	10,434	163	656	9,615	72.9

Continued -

Supply and distribution of all meats, calendar years, 1909-40 1/ - Continued

1/ Production and stock data for these meats were compiled from the annual publication "Livestock, Meats, and Wool Market Statistics and Related Data," now published by the Food Distribution Administration of the United States Department of Agriculture. Trade data originally compiled from Bureau of Foreign and Domestic Commerce and adjusted to a dressed weight basis by the Bureau of Agricultural Economics. Production refers to total United States slaughter. Consumption estimates for the years 1916-19 do not exclude military consumption. In 1934 and 1935 includes slaughter under the Government relief purchase program.

2/ Includes 1,354 million pounds slaughtered under the emergency Government relief purchase program in 1934 and 62 million pounds in 1935.

3/ Includes 21 million pounds which was distributed under the emergency Government relief program.

4/ Includes 127 million pounds of meat that was distributed under the Government purchase program. This excludes those pork products which were purchased as commercial cuts or rendered lard since it was assumed that these items were already included in the production figures given in "Livestock, Meats, and Wool."

RETAIL PRICE CEILINGS ON FOODS, ISSUED JULY 24-AUGUST 18, 1943

Date issued	Foods	Ceiling prices
7-27-43	Berries and red sour cherries	Fixed markup over net cost. Effective 8-5-43. (MPR 422, Am. 1; MPR 423, Am. 1) Formerly not subject to price control at retail.
7-27-43	Fruit cake	Gross margin, Oct. 1-Dec. 31, 1942, added to specified costs of ingredients, packages and labor, for sales by processors. Slight increase expected for consumers. Effective 7-31-43. (MPR 319, Am. 5) Formerly under RSR 14.
8-5-43	Malted milk preparations	Preparations containing 35 percent or more malted milk returned to coverage under MPR 280. Effective 8-5-43. (MPR 422, Am. 2; MPR 423, Am. 2)
8-5-43	Cookies, crackers, toast and crumbs	Loose sales grouped under "miscellaneous foods" rather than commodities, and markup thereby increased. Effective 8-5-43. (MPR 422, Am. 2; MPR 423, Am. 2)
8-6-43	Frozen fruits, berries and vegetables, 1943 pack	Maximum processor prices revised upward to reflect increased labor costs. Increased cost to consumers because of markup regulation. Effective 8-6-43. (MPR 409, Am. 2)
8-16-43	Potato chips	Dollars-and-cents ceilings, effecting increase of approximately 10 percent in cost to consumers. Effective 8-26-43. (MPR 457) Formerly under GMPR.

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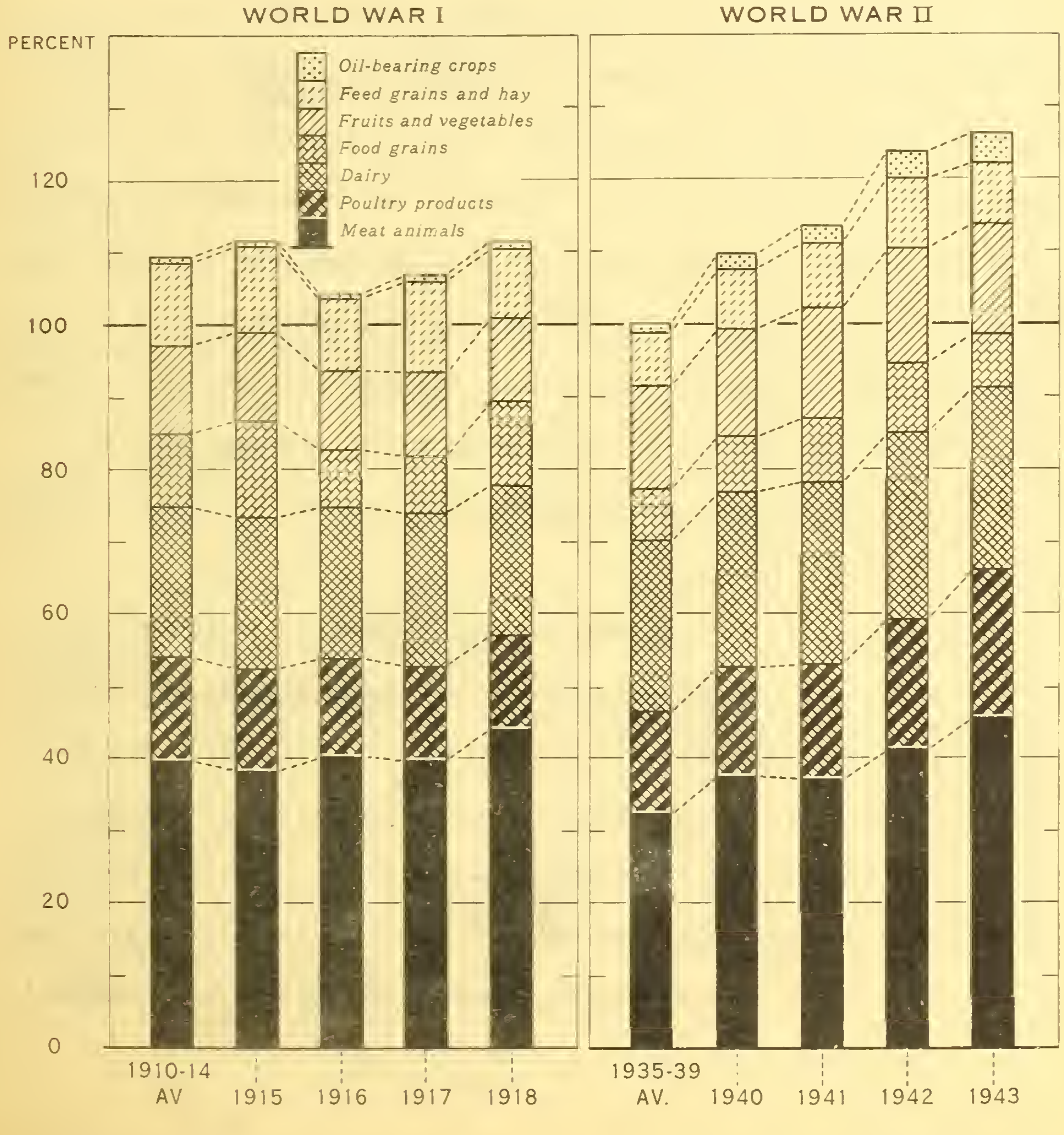
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-9 BAE SEPTEMBER 1943

PER CAPITA VOLUME OF AGRICULTURAL FOOD AND FEED PRODUCTION FOR SALE AND FARM HOME CONSUMPTION IN WORLD WAR I AND WORLD WAR II

INDEX NUMBERS (1935-39=100)



U. S. DEPARTMENT OF AGRICULTURE NEG. 43277 BUREAU OF AGRICULTURAL ECONOMICS

THE NATIONAL FOOD SITUATION

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Summary

The prospects for total agricultural production declined somewhat during August but the estimate of total food production in 1943 remains unchanged from a month earlier -- 32 percent above the average in 1935-39 and 5 percent above 1942. Because of large war requirements, the civilian per capita consumption in 1943 will average only slightly above the consumption in 1935-39. The September 1 crop report indicated a substantial increase over last month in the prospects for corn and potatoes, a slight increase in wheat, rye, dry edible beans, and soybeans, but a decline in grain sorghums, sweetpotatoes, peanuts, oats, barley, hay, and sugarcane.

Meat production for the year as a whole will be of record size. Marketings of cattle and calves increased more than seasonally during August, and slaughter is expected to continue at a high level for the remainder of the year. Hog slaughter declined more than seasonally during August, but, with a large spring pig crop soon starting to market, pork production for the remainder of 1943 should be above average. The relatively high level of production, together with the recent changes in

Government regulations which lowered the point values of many cuts of meat will probably result in a somewhat larger quantity of meats for civilian consumption in the last quarter of 1943.

Marketings of chickens have been increasing rapidly and supplies for civilians for the remainder of 1943 will be considerably larger than the previous record established in 1942. Egg production in August was 9 percent above the previous record reached in August 1942. Supplies of undergrade eggs have been plentiful but supplies of high-grade eggs have not been sufficient to meet demand. Total egg production will decline seasonally until November but will continue larger than a year earlier throughout the remainder of the year and the quantity available for civilians is likely to be higher than the record set in the same period last year.

To prevent a continued increase in the sales of fluid milk and cream, the War Food Administration, on September 10, announced a program to limit sales of these items through a system of dealer quotas. Under this program, fluid milk sales will be held at recent levels. However, even if fluid milk consumption is held at the present level, most manufactured dairy products (especially creamery butter, dry skim milk, and whole milk cheese) are expected to be smaller in the last quarter of 1943 than a year earlier. Supplies of butter for civilians continued extremely short during August and September. To alleviate this situation, the War Food Administration reduced the amount of butter to be set aside for Government purchases in September and completely eliminated the set-aside for October.

Prospects for fruit production this season remain approximately the same as was indicated a month ago -- a total citrus and deciduous production 11 percent smaller than last season. The production of prunes, grapes, and figs, however, is expected to be larger than last year and citrus production will be about the same as in 1943-44. Fresh fruit supplies for civilians for the 1943 season will probably be about 15 percent smaller than last season while supplies of canned deciduous fruits may be two-thirds to three-fourths the total of the 1942-43 season. However, supplies of other fruits and fruit juices as well as dried fruits may be larger in 1943-44 than in 1942-43.

The combined production of all commercial truck crops for the fresh market in 1943 is now estimated to be 9 percent smaller than in 1942 but 2 percent above the 10-year (1932-41) average. The reduction from 1942 is especially pronounced for onions, cabbage, cantaloups, celery, and watermelons. The production of the important processing vegetables is expected to be only 6 percent smaller than the record production harvested in 1942 but will exceed the 10-year (1932-41) average by 64 percent. A potato crop of 460 million bushels was indicated on September 1. This year's crop will be 24 percent greater than last season's and supplies in prospect for civilians in 1943-44 are expected to be 5 to 10 percent larger than in 1942-43. The dry bean crop is estimated to be 23 million bags of 100 pounds each -- 17 percent above the record crop harvested in 1942. It appears that dry bean supplies for civilians will be adequate to meet demand.

Prospects for wheat are about the same as they were last month. The corn crop, however, is now estimated to be 2,985 million bushels, or 110 million bushels more than was indicated on August 1. This is about

6 percent below the record production of last year but the second largest corn crop in 23 years. The total supply of feed grains in 1943-44 (including wheat and rye for feeding) is now estimated at 146 million tons, 8 million tons smaller than in 1942 but the second largest supply on record. However, the number of grain-consuming animal units on farms January 1 is likely to be 10 percent greater than at the beginning of 1943, so that the supply of grains per animal unit may be about 10 to 15 percent smaller than in 1942-43 but slightly above the average for the period 1937-41.

-- September 15, 1943

COMMODITY REVIEWS

Meats

The Office of Price Administration lowered the point value of a number of cuts of meat on September 5 and the War Food Administration relaxed its quota restrictions on slaughterers for the next 2 months starting September 1. Deliveries to civilian channels may increase during this period, although federally inspected slaughterers are still required to set aside 45 percent of the beef meeting Army specifications.

Marketings of cattle increased more than seasonally during August, with federally inspected slaughter 17 percent higher than in July. Calf slaughter, which had been running low, also increased and was 30 percent above July. On the basis of marketing reports, it appears that a substantial part of the increased cattle marketings consists of grass-fed cattle from the Southwest where the weather has been unusually dry. Cattle marketings will increase seasonally through November and, with no quota limitations in effect, consumers are likely to receive a larger amount of beef than in recent months.

Inspected hog slaughter has declined more than seasonally during August and was 18 percent below July, though still 39 percent above the corresponding month a year ago. Total marketings for the crop year beginning October 1942 are now approximately in line with expectations based on the 1942 pig crop. Heavy marketings during the latter part of the crop year have about compensated for the relatively light marketings earlier. Since the large 1943 spring pig crop will start coming to market soon, pork production for the remainder of 1943 is expected to be at a high level.

The number of sheep and lambs going to slaughter continued to increase in August. Slaughter under Federal inspection was 14 percent above July and 23 percent above the unusually heavy slaughter in August 1942. Heavy marketings of ewes still appear to account for most of the increase in slaughter above last year.

Poultry and Eggs

The increased sales of chickens by farmers has greatly relieved the tight supply situation that prevailed in most poultry markets during the first half of 1943 and supplies of chicken for the remainder of the year will be considerably larger than the previous record established in 1942. Prices, however, are likely to be at or close to the ceiling levels which are slightly higher than the prices prevailing in the second half of 1942.

The volume of young chickens has been increasing more rapidly than the volume of fowl (mature hens). Thus, in early September young chickens accounted for about 60 percent of the total volume at Midwest primary markets compared with less than 30 percent in early July.

Food Distribution Order 71, as amended in mid-August, providing that no live or dressed turkeys may be sold except for Government uses, will stay in effect until sufficient turkey has been purchased for the United States armed forces. This is expected to be accomplished early in October.

Egg production in August was 9 percent above the previous record for that month in 1942 and 40 percent above the 1932-41 average for August. The temporary curtailment of egg-drying operations has resulted in relatively large supplies of undergrade eggs in terminal shell egg markets. Consequently, supplies of such eggs have been ample to meet demand at ceiling levels and in some instances wholesale prices have been a little below ceiling levels. Supplies of high-grade eggs, on the other hand, have not been sufficient to meet demand.

With a seasonal decrease in the average rate of production per bird, total egg production will decline until November but is very likely to continue larger than a year earlier through the remainder of 1943.

Drying plants will shortly resume operations for late fall and winter deliveries. Eggs for these drying operations, however, will consist mostly of storage shell and frozen stocks. Thus, in the coming months of lowest production, supplies of eggs for civilians are likely to be larger than the record level set in the corresponding period of 1942-43 though probably short of demand.

Dairy Products

On September 10, the War Food Administration authorized the Director of Food Distribution to limit sales of fluid milk and cream through a system of dealer quotas. Quotas probably will be established first for those dealers in urban areas where milk supply problems are most critical. The purpose of this program is to prevent a continued increase in sales of fluid milk and cream which would seriously reduce the supply available for manufactured dairy products such as cheese and butter. Fluid milk sales will be held at approximately the current level but sales of cream and fluid milk byproducts (cottage cheese, flavored milk drinks, and cultured buttermilk) may be reduced.

Even though sales of fluid milk and cream are held at their current level, production of most manufactured products in the second half of 1943 will be considerably smaller than a year earlier. Largest declines are expected to occur in the production of creamery butter, dried skim milk, and whole milk cheese.

Despite the reduction in the percentage of butter to be set aside for Government purchase and a 2-point increase in the value of butter, supplies for civilians at terminal markets continued extremely short of demand during August and early September. Apparently consumers in the principal butter-producing areas spend more than the normal proportion of ration points for butter, and creameries sell a substantial part of their civilian quotas in the local market. As a result, although the civilian quotas for August were 70 percent of total production, more than half of the butter reaching terminal markets was earmarked for Government purchase. Moreover, trade reports indicate that many manufacturers fell behind in their Government deliveries and consequently were setting aside butter from the seasonally lower August production which should have been set aside from the July output.

On August 31, the War Food Administration announced that the amount of butter which producers must set aside for Government purchase had been reduced from 30 to 20 percent of September production and that the previously announced 30 percent set-aside for October has been eliminated. A large portion of Government requirements for butter were accumulated in storage during the spring and summer months of heavy production so that civilians could receive most of the output during the fall and winter. War requirements for the period September through March will reach nearly 270 million pounds, but storage stocks (including some commercial stocks) on August 1 totaled 210 million pounds.

To assist in holding civilian consumption of butter in line with the War Food Administration allocations, the value of creamery butter was raised from 10 points to 12 points, effective September 5. The point value for farm and country butter was set at 6 points and for process butter was continued at 4 points.

Fruits

Prospects for fruit production this season remain approximately the same as indicated a month ago -- an aggregate production, citrus and deciduous, about 11 percent smaller than last season's. All major deciduous fruit crops, with the exception of prunes, grapes, and figs, are expected to be materially smaller than last year. The indicated grape crop is larger than any on record. Citrus production may be about the same in 1943-44 (crops from the 1943 bloom) as in 1942-43, providing growing conditions continue favorable. September 1 conditions were more favorable for citrus crops in California this season than last, but were somewhat less favorable in Texas and Florida.

Deciduous fruit crops are especially short in the eastern half of the United States -- which produces fruits primarily for fresh consumption. Consequently, the effect of the short crops has been felt most keenly in the fresh fruit markets of the East. Processed packs, however, also are expected to be substantially smaller than a year ago.

Fresh fruits, with the exception of grapes, are expected to be in shorter supply during the next few weeks than in August and early September. September and October are in-between-season months for oranges and grapefruit. Lemon shipments also are decreasing. The apricot and cherry seasons are over, and shipments of peaches, pears, plums, and fresh prunes probably have decreased considerably since mid-September.

For the 1943 season as a whole, present indications are that fresh fruit supplies for civilians will be about 15 percent smaller than last season. Food Distribution Order 22.4, as recently amended, reduced the quantity of the canned apple and fruit cocktail packs which must be set aside for the Government by about 400,000 cases and 1 million cases, respectively. Despite this reduction in Government requirements, civilian supplies of canned deciduous fruits may be only about two-thirds to three-fourths those of the 1942-43 season. However, larger packs of other fruits and fruit juices will offset to some extent the smaller canned deciduous fruit supply. Civilian supplies of dried fruits may be slightly larger in 1943-44 than in 1942-43.

Truck Crops

Commercial truck-crop production for fresh shipment is expected to be about 13 percent smaller during the next few weeks than for the same period last season, but about 12 percent larger than the 10-year (1932-41) average. The acreage of such crops is larger than a year ago, but hot, dry weather in southern New England, some of the Middle and South Atlantic States, and the Southwest has reduced production materially. Supplies of cabbage, carrots, and tomatoes should continue relatively plentiful throughout September and early October. Shipments of cauliflower, celery, onions, and spinach are increasing over the August level, but, with the possible exception of spinach, probably will continue materially smaller than last season. Shipments of lettuce are expected to continue in about their present volume, but the peak movement of snap beans, lima beans, cantaloups, watermelons, cucumbers, and peppers is past, and supplies of these vegetables during the next few weeks will be materially smaller than in August and September. Commercial truck-crop production for fresh market shipment thus far this season has been about 10 percent below comparable production last season but about 2 percent larger than the 10-year (1932-41) average.

Aggregate production this season of truck crops for processing (basis September 1 estimates) is expected to be about 6 percent smaller than last season but 64 percent above the 10-year (1932-41) average. The "processing" tonnage of individual vegetable crops this season compared with last is indicated to be larger for snap beans and carrots, about the same for corn, and smaller for tomatoes, green peas, and other truck crops. Present indications are that civilian supplies of canned vegetables during the 1943-44 season may be only about 5 to 10 percent smaller than in 1942-43.

Potatoes

September 1 conditions indicate a potato crop of 460 million bushels, 24 percent larger than last season's and 27 percent above the 10-year (1932-41) average. Production in the 30 late States, which provide most of the marketings from mid-August until late next spring, is estimated to be about 26 percent larger this year than last. Potatoes are expected to continue to move to market in plentiful quantities this fall. Civilian supplies in prospect for the 1943-44 season as a whole are 5 to 10 percent larger than last season's.

Dry Beans

The dry bean crop this season is estimated at 23 million bags of 100 pounds each, 17 percent larger than the record crop harvested in 1942 and 60 percent larger than the 10-year (1932-41) average. It appears probable that civilian supplies of dry beans this season will be adequate to meet demand.

Wheat, Rye and Rice

The September 1 crop report indicated a total wheat crop of 835 million bushels -- practically unchanged from a month earlier. This is about 146 million bushels below the near-record crop of last year but 97 million bushels above the 1932-41 average. The carry-over on July 1 was 618 million bushels yielding a total prospective domestic supply of 1,453 million bushels. A supply of this size is second only to the record supply of 1,613 million bushels in 1942-43.

In spite of the exceptionally large uses of wheat for feed and alcohol, the prospective supply should be about adequate to meet requirements. Wheat is being used to supplement supplies of feed grains for feeding the unprecedented number of animals, and alcohol from wheat is being used for making synthetic rubber and smokeless powder.

Of the total domestic supply, approximately 540 million bushels are expected to be used for food in 1943-44, 100 million bushels for alcohol, 80 million bushels for seed, 450 million bushels for feed, and 35 million bushels for exports and shipments. Wheat imports may be expected to supplement the quantity of domestic wheat for feed.

The rye production, indicated August 1 at 33.3 million bushels, will not be revised until December. With stocks of rye at the beginning of the 1943-44 year amounting to 42.4 million bushels, the total domestic supply for 1943-44 is estimated at 76 million bushels, compared with 88 million in 1942-43 and an average of 57 million in 1934-41. Since only about 11 million bushels are needed for food and 8 for seed, relatively large quantities remain available for animal feed and production of industrial alcohol.

The rice production, indicated September 1 at 71.2 million bushels, is slightly above the estimate of a month earlier. The indicated production this year is 7 percent above the record crop in 1942 and 50 percent above the 1932-41 average. A crop of this size is expected to cover prospective requirements and leave a moderate carry-over at the end of the 1943-44 marketing year.

Feed Situation

Prospects for feed crops improved for the country as a whole during August although drought areas centering around Maryland and Oklahoma increased in intensity. In these areas there has been considerable damage to corn, hay crops, and pastures. In the Corn Belt, however, conditions continued to be favorable, and the 1943 corn crop was indicated to be 2,985 million bushels on the basis of September 1 condition, 110 million bushels more than was indicated August 1.

The total 1943-44 supply of feed grains, including wheat and rye for feed, is now estimated at 146 million tons, 8 million tons smaller than in 1942, but the second largest supply on record. This, plus the prospective supply of low-protein byproduct feeds, gives a total supply of low-protein concentrates of 152 million tons for 1943-44, which is 5 percent smaller than last year but 40 percent above the 1935-39 average.

Supply of feed concentrates in relation to livestock on farms, 1935-43

Marketing year	Supply low-protein concentrates					Supply high-protein feed				
	Feed grains 1/	Low protein by-product feeds	Total	Grain consuming animal units Jan. 1	Supply per animal unit	Four oil-meals	Other protein feed 2/	Total	Grain consuming animal units Jan. 1 3/	Supply per animal unit
	Mil. tons	Mil. tons	Mil. tons	Mil.	Tons	Mil. tons	Mil. tons	Mil. tons	Mil.	Lb.
Average 1935-39	103.7	5.0	108.7	126.4	.85	3.3	4.7	8.0	108.9	147
1940-41	125.4	5.3	130.7	133.4	.98	4.4	5.2	9.6	117.3	165
1941-42	132.9	5.0	137.9	143.1	.96	4.7	5.3	10.0	127.4	158
1942-43	154.2	5.6	159.8	158.9	1.01	6.1	5.2	11.3	143.7	157
1943-44 4/	146.0	6.0	152.0	175.0	.87	6.4	5.2	11.6	160.0	145

1/ Includes wheat and rye for feed.
2/ In terms of oilmeal equivalent.
3/ Excluding horses and mules.
4/ Preliminary estimate.

The quantity of domestic wheat available for feeding during the year beginning October 1, 1943, is likely to be much smaller than during 1942-43 when the quantity fed totaled about 470 million bushels. Government feed wheat has been a major source of feed in many of the deficit feed areas during the past year. Hence, the smaller supplies in prospect for sale in 1943-44 may mean a greater reduction in feed available in the deficit areas than in the Corn Belt, unless steps can be taken to move increased quantities of wheat and feed grain into these areas from the Corn Belt.

With livestock on farms increasing, the number of grain-consuming animal units is expected to be about 10 percent greater than at the beginning of 1943. In this event feed supplies are expected to be 10 to 15 percent smaller per grain-consuming animal unit than in 1942-43 but slightly larger per animal than the 1937-41 average.

High-protein feed supplies may be a little larger in 1943-44 than in 1942-43, because of prospective larger supplies of oilmeal, distillers' dried grains, tankage, and meat scrap. The supply will be about 8 percent smaller in relation to the number of livestock on farms January 1, but with smaller supplies of other feed concentrates in prospect, livestock rations may be a little higher in the percentage of protein contained than in 1942-43.

RETAIL FOOD COSTS, AUGUST 1943

Retail prices of all foods combined decreased 1.3 percent from mid-July to mid-August, compared with a decline of 0.5 percent in the cost of living, according to the Bureau of Labor Statistics indexes. The August level of food prices represents an increase of 8.8 percent over August 1942, or an average increase of 0.7 percent a month during the past year.

The largest price decreases in August occurred for fresh fish, fruits, and vegetables. In addition, prices of practically all meats continued to decline slightly. The price of eggs showed a seasonal increase. Price changes in the other major food groups were insignificant.

The drop in fresh fish prices is due to a maximum price regulation that became effective July 20. Prices of potatoes, onions, and apples declined according to the usual seasonal trend. The price of sweetpotatoes decreased more than seasonally from an abnormally high level. Contrary to seasonal trends, prices of bananas rose slightly, and prices of spinach, green beans, and grapefruit declined. The price of spinach reached a peak earlier than usual, whereas the price of green beans is reaching its low level unusually late. The price of carrots declined less than seasonally, and the price of oranges rose more than seasonally. Specific maximum prices placed on lettuce and cabbage on July 20 resulted in substantial decreases in their prices. Apples and sweetpotatoes are still not subject to price control.

The following table shows the percentage change in prices of the main food groups and of each fresh fruit and vegetable contained in the Bureau of Labor Statistics series during the past 2 years, the past year, and the past month.

Percentage change in retail prices of foods, United States, selected periods

Commodity	Aug. 1941- Aug. 1943	Aug. 1942- Aug. 1943	July 1943- Aug. 1943
	Percent	Percent	Percent
All foods	+ 27.0	+ 8.8	- 1.3
Cereals and bakery products	+ 9.2	+ 2.7	+ .3
Meats	+ 16.6	+ .2	- .9
Beef and veal	+ 6.3	- 4.9	- .8
Pork	+ 4.4	- 7.3	- .9
Lamb	+ 23.2	+ 1.5	- 1.1
Chickens	+ 42.8	+ 11.7	+ .1
Fish, fresh and canned	+ 61.1	+ 22.8	- 2.9
Dairy products	+ 16.5	+ 6.0	---
Eggs	+ 38.7	+ 14.9	+ 9.0
Fruits and vegetables	+ 64.3	+ 27.6	- 5.9
Fresh	+ 72.8	+ 32.7	- 7.0
Apples	+ 140.4	+ 71.2	- 16.9
Bananas	+ 66.7	+ 20.0	+ 2.6
Grapefruit 1/		+ 14.3	- 4.0
Oranges	+ 42.9	+ 27.3	+ 5.0
Beans, green	+ 50.5	+ 13.2	- 14.9
Beets 1/		- 2.4	- 3.5
Cabbage	+ 15.7	+ 16.7	- 24.6
Carrots	+ 58.8	+ 19.1	- 2.4
Lettuce	+ 27.3	- 14.3	- 6.7
Onions	+ 79.5	+ 75.6	- 10.2
Potatoes	+ 89.1	+ 30.3	- 9.8
Spinach	+ 38.1	+ 26.4	- 7.6
Sweetpotatoes	+ 149.1	+ 71.1	- 17.4
Canned	+ 29.9	+ 6.0	- .2
Dried	+ 46.6	+ 15.2	+ .6
Beverages	+ 20.7	+ 1.5	+ .6
Fats and oils	+ 27.5	+ 5.1	---
Sugar and sweets	+ 16.1	- .1	+ .2

1/ Not included in index. No price quotation for August 1941.

AGRICULTURAL FOOD PRODUCTION IN WORLD WAR I AND WORLD WAR II [1]

Both World Wars brought about devastation on agricultural producing areas in Europe, shut off normal imports and exports of food commodities, curtailed the production of agricultural implements, and reduced the farm labor supply. The result in both cases was widespread food shortages. The United States, being the richest agricultural country and far removed from the ravages of the war, became a major source of food supply for our Allies in both wars.

By and large, the United States, though producing about the same amount of food on a per capita basis at the beginning of the two wars, was in a more favorable position to expand production and meet the wartime food demands at the beginning of this war than of the first World War. Several factors were responsible for this situation. Favorable weather which began in 1937 and culminated in the unusually favorable season in 1942 was to a large part responsible for record breaking yields. Improved agricultural practices, machinery, fertilizer, and seed, all developed since World War I, have also helped to increase production. Soil conservation measures undertaken by the Government during the period of depression and experience in administration of agricultural programs during recent years likewise contributed to the record-breaking expansion of agricultural production. In addition, transportation difficulties have thus far not been as serious in this war as in World War I.

These favorable conditions for increasing agricultural production in World War II, however, were offset to some extent by serious restrictions in the production of farm machinery and shortages of farm labor. The global character of this war and the urgent requirements of our Allies necessitated an "all out" production of military equipment immediately upon our entrance into the war. This sharply curtailed the manufacture of farm machinery, the requirements of which are much greater now than they were in the first war. The rapid expansion of the Army and industry, moreover, drained off a great deal of the farm labor supply creating serious farm labor shortages. Farm labor shortages also existed in the first World War but were alleviated somewhat by increased mechanization of farming. Our Army in the first war was much smaller than it is at present and was equipped, to a large degree, by our Allies so that the manufacture of farm machinery was not greatly restricted by the production of war supplies.

Not only were the conditions for converting United States agriculture to a wartime basis different in the two wars but the food problems faced by the Government and the farmers were not the same. The biggest problem which confronted the Food Administration in the first World War was shortages in wheat, sugar, and meats (chiefly pork), although only sugar and wheat were ever in severe short supply. The crisis in sugar was caused by the fact that the Allies and European neutrals were cut off from the Austro-Hungarian beet fields and were forced to depend on supplies from the United States and Cuba. The wheat crisis, on the other hand, resulted from small world supplies of wheat in 1917 and 1918. Great Britain, normally dependent upon imports for her wheat supply, could not get wheat from Russia as a result of the blockade and the tight shipping situation, and long distances prevented England from getting wheat from Australia and Argentina. At that time Canada was not nearly as important a wheat-producing area as she is now. The demand, therefore, concentrated on the United States. Unfortunately, our crops in 1916 and 1917 were small.

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[1] The following discussion does not attempt to cover the consumption phase in the two war periods.

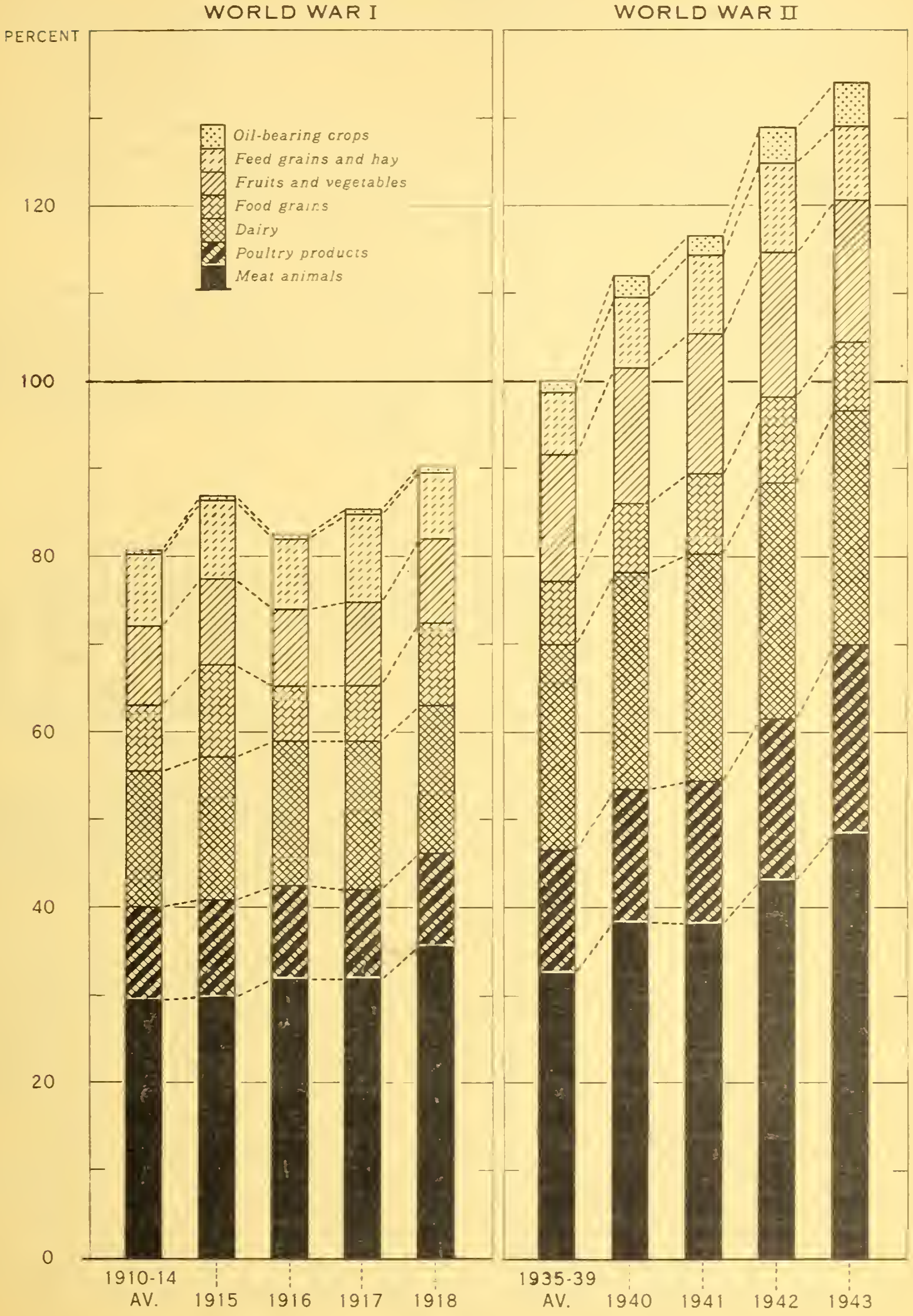
The apparent critical situation in meat at the beginning of the last war arose from a widespread fear that the production of meat (especially pork) in the United States might not be equal to the Allied, military, and civilian demands. As it later developed, the combined effects of increased production, voluntary conservation measures instituted by the Government, and smaller than anticipated Allied demands resulted in a near glut on the market in 1918.

In the present war, the sugar situation has not been as critical and wheat for food uses so far has not been a problem. The contrast between the wheat situations in the two World Wars is striking. In World War I, we had to supply wheat not only to England but also to Italy and France who were our Allies and were deficit wheat producing countries. In this war, only England of our Western Allies needs to be supplied and all her requirements can be met by Canada. On the other hand, while in the last war Russia did not require any wheat from us, her loss of the Ukranian wheat fields to Germany has made her now an important importer of wheat, under lend-lease arrangements, from the United States.

In the crop year 1941-42, the world supply of wheat was of record size and the United States crop in 1941 was 943 million bushels with a carry-over on July 1 of 385 million bushels. In 1917, on the other hand, not only was the world supply very small but the crop in the United States was only 620 million bushels and the carry-over on July 1 was no more than 80 million bushels. In addition to the smaller supply, net exports of wheat in the crop year 1917-18 amounted to almost 103 million bushels compared with only 23 million bushels in 1941-42. Similarly, in 1918-19 the total supply of wheat was 944 million bushels and net exports amounted to 277 million bushels while in 1942-43 the total supply was 1,614 million bushels and net exports were only 26 million bushels.

TOTAL VOLUME OF AGRICULTURAL FOOD AND FEED PRODUCTION FOR SALE AND FARM HOME CONSUMPTION IN WORLD WAR I AND WORLD WAR II

INDEX NUMBERS (1935-39=100)



U. S. DEPARTMENT OF AGRICULTURE

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In this connection it is interesting to note that in the present war we are not only using large quantities of wheat for alcohol and synthetic rubber but about one-third of the 1942 wheat crop was fed to livestock during the 1942-43 season and a somewhat larger portion of the 1943 crop is expected to be used for feeding in the 1943-44 season. In the first war, however, feeding wheat to livestock was considered highly unpatriotic.

The greatest demands on the United States at present are for products such as meats, eggs, dairy products, fruits, and vegetables which can be packed and shipped in concentrated form. The critical situation in fats and oils was created by the loss of imports from the Pacific areas as a result of our war with Japan.

The increased demand for the protective foods in this war is partly accounted for by a greater knowledge of nutrition which stresses the importance of vitamins in contrast to the emphasis placed on calories in the last war. The more successful conversion of Great Britain's agriculture to the production of staple foods such as wheat and potatoes is also a factor in the shift in the demand.

Total Food Production

The level of food production in the United States was about the same on a per capita basis in the first year of the two World Wars. The per capita food production in both 1914 and 1939 was 5 percent above the base period 1935-39. In 1915 the production had risen 3 percent, but, as a result of crop failures in the ensuing 2 years, it declined, and by 1917 was only 2 percent above the base period. In 1918, however, the per capita food production increased 9 percent over the previous year and was the highest production attained in the United States until 1941.

Food production in the second World War presents a more striking picture. Beginning in 1939 with the same per capita production as in 1914, it increased 4 percent in 1940, increased 3 percent in 1941 and broke all then existing records, rose another 8 percent in 1942, and is expected to show a further increase of 3 percent in 1943.

In both wars, production of food livestock held up much better than food crops. The per capita production of food crops reached a record level in 1915 (exceeded only by the 1942 production) but declined 25 percent in 1916. It remained at a low level in 1917 but increased sharply in 1918 when it was only 7 percent smaller than in 1915. The per capita production of food livestock, on the other hand, with the exception of a slight decline between 1916 and 1917, continuously increased during the war period and was 10 percent greater in 1918 than in 1914. In the present war the per capita production of food crops increased 14 percent between 1939 and 1942 when it was 119 percent of the 1935-39 average but is expected to be 107 percent of the base period in 1943. The per capita production of food livestock, however, has increased 15 percent between 1939 and 1942, and in 1943 is expected to exceed the record production of 1942 by 7 percent.

Agricultural food production for sale and farm home consumption in World War I and World War II

Index numbers (1935-39 = 100)

Year	Production			United States population 1/	Per capita production 2/		
	Food crops	Food livestock	Total		Food crops	Food livestock	Total
1910-14 average	75	79	78	74	101	107	106
1914	88	78	81	77	114	101	105
1915	92	82	84	78	118	105	108
1916	70	84	81	79	89	106	103
1917	75	84	82	80	94	105	102
1918	89	90	90	81	110	111	111
1935-39 average	100	100	100	100	100	100	100
1939	105	106	106	101	104	105	105
1940	109	112	111	102	107	110	109
1941	116	115	115	103	113	112	112
1942	124	126	126	104	119	121	121
1943 3/	113	138	132	106	107	130	125

1/ Population on July 1.
2/ Index of production divided by index of United States population.
3/ Preliminary.

Food and Feed Crops

The extent of conversion to a war footing is to be measured not only in the over-all increase in production but, what is more important, in the direction of production to meet the most urgent requirements. As previously pointed out, one of the most pressing problems in World War I was the shortage of wheat. The harvested wheat acreage in 1910-14 was 50 million acres. In 1914 it was 56 million. It rose to 60 million in 1915 but by 1917 had declined to about 47 million acres. However, in 1918 the harvested acreage rose to 61 million acres. The decline in harvested acreage in 1916 and 1917 is not necessarily an indication of a decline in acreage planted, since the abandonment may have been unusually large in these years when the yields per acre were 12 and 13 bushels, respectively, compared with an average yield of 14.3 acres in the period 1910-14. However, statistics on planted acreage for this period are not available. At the beginning of World War II, the United States had abundant stocks of wheat and the need was for an expansion in oil-bearing crops to offset the loss of imports from many areas involved in the war. Accordingly, wheat acreage was reduced. In 1935-39 the planted wheat acreage was over 73 million acres and by 1942 it had declined to 52.5 million acres. In 1943 the acreage was increased to 54 million acres. Yields per harvested acre were much larger in this war than in World War I. While in 1935-39 the yield per harvested acre was 13 bushels, it rose to about 20 bushels in 1942 and is expected to be close to 17 bushels in 1943.

While wheat production received the greatest emphasis in World War I, the production of oil-bearing crops assumed major importance in World War II. The spread of the war to the Pacific area made necessary an increase in the production of domestic oil-bearing crops to replace the loss in imports of vegetable oils. In 1938 the acreage of oil-bearing crops was 5.6 million acres. By 1941 the acreage had been increased to 11 million acres. With the impetus of agricultural goals and support-price programs, the harvested acreage rose to 18.6 million acres in 1942 and is expected to reach about 22 million acres in 1943. In the first World War, the oil-bearing crops were of minor importance in total food and feed crop production. The production of these items never constituted more than 1/2 of 1 percent of the total while in 1943 it is expected to reach almost 4-1/2 percent.

The next most important problem in shifting agriculture to a war footing is that of increasing feedstuffs for livestock production. At the outbreak of World War II, the United States had a smaller acreage devoted to feed crops than in the corresponding period of the previous war. From 1929 to 1939 there was a considerable reduction in the total acreage of all crops in order to adjust to a smaller domestic and foreign demand which resulted from the depression. The adjustment to reduced demand conditions was implemented by the production and conservation programs of the Agricultural Adjustment Administration. The droughts in the middle 1930's were also influential in reducing acreage.

In 1935-39 the harvested corn acreage was 93 million acres compared with 101 million acres in 1910-14. The acreage declined to 87 million in 1940 but has been increasing since then. It is estimated to be 94 million acres in 1943. In 1915, on the other hand, the harvested corn acreage was 101 million acres, reached 111 million in 1917, and then dropped to 102 million in 1918. In spite of the larger acreage in the first World War period, the average production of corn in 1915-18 was smaller than in 1940-43. This is accounted for by exceptionally large yields in the later period resulting from favorable weather, widespread use of hybrid seed, increased use of fertilizers, and improved operating practices. Thus, the yield per harvested acre in 1915-18 averaged about 26 bushels compared with about 32 bushels in 1940-43.

In both wars the harvested acreage of oats and barley was substantially expanded. In the first World War oats acreage increased from 38.8 million acres in 1915 to 42.5 million acres in 1918. In World War II, it increased from 35.3 million acres in 1940 to 37.9 million acres in 1943. Likewise, harvested acreage of barley increased from 7.3 million acres in 1915 to 9.2 million acres in 1918 and from 13.5 million acres in 1940 to 15.1 million acres in 1943.

The combined production of feed grains has been substantially larger in the present war than in the first war. The average production in 1915-18 was about 89 million tons. In 1940-43 it was 109 million tons, a difference of 22 percent.

Livestock

In both wars much attention was focused on the expansion of livestock production. The production of some items of livestock can be increased more rapidly than others. Hog and poultry production, for example, respond more readily to increased demand and can be rapidly increased. On the other hand, the number of cows, beef cattle, sheep and lambs on farms cannot be increased very quickly but some increases in the weight per animal and milk per cow may be attained by more intensive feeding.

Large accumulations of feed stocks and wheat at the outset of the present war and unusually good crops during it have made a rapid expansion of livestock production possible. In the first World War, however, shortages of feed grains were a limiting factor in the expansion of livestock production. While, on the whole, the number of animals on farms on a per capita basis is smaller in this war than in the first, the output of animal products on a per capita basis is much higher. This is accounted for by heavier weight and greater production per animal. For example, the average dressed weight per hog in this war has been 10 percent greater than in the first war, the number of pigs per litter has been higher, and the feeding period shorter. Similarly, the average number of eggs per layer has been 25 percent greater and the average output of milk per cow 28 percent greater.

To increase the meat supply to meet war demands, the attention in both wars was centered on hogs. Not only did the Allied demand for pork in both wars greatly exceed their demand for beef but the highly productive and quickly maturing hog afforded the best means of securing an increase in the United States meat supply.

In the summer and fall of 1917, the prospects of meeting foreign and domestic demand seemed unfavorable. The hog-corn price ratio was abnormally low and discouraged the feeding of corn to hogs. Under these circumstances, the Food Administration inaugurated a program to stimulate production of hogs. This program was based chiefly on the support of hog prices at a favorable level. Under the impetus of these programs, hog numbers on farms January 1 increased from 57.6 million head in 1917 to 62.9 million head in 1918. Hogs were also fed to heavier weight and the dressed weight per animal was 10 pounds more in 1918 than in 1917.

At the outbreak of this war hog prices were declining. The number of hogs on farms January 1, 1940, was estimated at 61 million head, and the average farm value of hogs on that date was $7.78 per 100 pounds. This was the largest number of hogs on farms since 1933, but the value was the lowest since 1935. This situation was discouraging to hog producers so that the number of hogs on farms was reduced during 1940 to 54 million on January 1, 1941. The Government foresaw the need of stepping up production to meet an increased demand for hogs resulting from the war. In April 1941, the Department of Agriculture announced a support-price program, and the increased demand for hogs was beginning to be registered in the market by rising prices. Farmers increased the fall pig crop of that year by more than 10 percent. The pig crop was 80 million head in 1940, 85 million in 1941, 105 million in 1942, and the number may reach 127 million in 1943. Not only has the number of hogs increased but, because of large grain supplies, the weight per animal was exceptionally high so that pork production increased from 8.7 billion pounds in 1939 to an expected 13 billion pounds in 1943 -- an increase of more than 49 percent.

The expansion of dairy production to meet needs presents more difficult problems. In the first place the number of cows cannot be increased rapidly. It takes more time to produce a cow than a hog. The number of milk cows on farms January 1 increased from 19.8 million head in 1914 to 21.5 million head in 1918 -- an increase of 9 percent. In this war the increase was from 24.6 million head in 1939 to 26.9 million head in 1943 -- about 9 percent more. The production of milk per cow appears to have remained fairly stable in the first World War at an average of about 3,600 pounds. In this war, production per cow has gone up from 4,589 pounds in 1939 to 4,739 pounds in 1942. However, due to competition from hog producers for grain, poorer pastures and labor shortages, production per cow will be somewhat less in 1943. Total milk production in 1914 is estimated to have been about 71 billion pounds and increased to 73 billion in 1918. In 1939, however, total milk production was about 107 billion pounds and increased to 119 billion pounds in 1942 and is expected to be 118 billion pounds in 1943.

Poultry production responds more rapidly to changes in demand than any other livestock commodity. In this war, poultry production showed a phenomenal rise. The number of chickens on farms increased about 30 percent between January 1939 and January 1943. The production of chicken meat has increased about 60 percent in the same period. Similarly, egg production has increased sharply -- about 40 percent in the last 3 years. In the first war, however, conditions for increasing poultry production were very unfavorable. A low egg-feed ratio and a tight feed situation prevented any significant increases in the production of either chickens or eggs in spite of the fact that the demand for them was large.

As the second World War continues into 1944, major adjustments in agricultural food production are in prospect. The acreage of food crops is likely to be increased but the present rate of increase in livestock production cannot be maintained because of the prospective tight feed situation. With a record number of livestock on farms, the supply of feed per animal unit in the crop-year 1943-44 is now estimated to be only slightly above the 1935-39 average. This will call for some important changes in feeding as well as a possible reduction in numbers for some classes of livestock. Meat and poultry production in 1944, however, is expected to be at least as large as in 1943, and dairy production should not be greatly different from the 1943 production if positive steps are taken to improve the feed and labor supply.

Table 1.- Comparison of production of food commodities before and during World War I and World War II 1/

Item	Production in war period as a percentage of pre-war average				Production during World War II as a percentage of production during World War I	
	World War I		World War II			
	Total	Adjusted for change in population	Total	Adjusted for change in population	Total	Adjusted for change in population
	Percent	Percent	Percent	Percent	Percent	Percent
	Acreage and production of selected food crops					
Wheat:						
Acreage	110	103	91	87	94	72
Production	109	102	118	113	113	86
Rice:						
Acreage	137	128	131	126	145	111
Production	148	138	122	117	173	133
Potatoes:						
Acreage	100	93	96	92	82	63
Production	97	90	106	102	116	89
Sweetpotatoes:						
Acreage	115	107	95	91	110	84
Production	118	110	93	89	94	72
Dry beans:						
Acreage	155	145	124	119	148	113
Production	122	114	138	132	234	179
	Acreage and production of oil crops					
Soybeans: 2/						
Acreage	---	---	270	260	---	---
Production	---	---	268	257	---	---
Peanuts:						
Acreage	215	200	174	168	280	214
Production	201	187	174	167	277	212
Flaxseed:						
Acreage	67	63	288	277	275	210
Production	64	60	361	347	358	274
	Acreage and production of feed grains and other feed products					
Corn:						
Acreage	103	96	96	92	86	66
Production	101	94	122	117	107	82
Oats:						
Acreage	109	101	104	100	92	70
Production	125	116	118	113	91	69
Barley:						
Acreage	107	100	138	132	183	140
Production	118	110	150	144	185	142
All hay:						
Acreage	106	99	107	102	101	78
Production	116	108	116	112	109	84
Byproduct feeds: (Disappearance)	120	112	133	128	154	118
Total feed grains (Disappearance)	105	98	139	133	123	94

Continued -

Table 1.- Comparison of production of food commodities before and during World War I and World War II 1/ - Continued

Item	Production in war period as a percentage of pre-war average				Production during World War II as a percentage of production during World War I	
	World War I		World War II			
	Total	Adjusted for change in population	Total	Adjusted for change in population	Total	Adjusted for change in population
	Percent	Percent	Percent	Percent	Percent	Percent
	Production of livestock products					
Total meat	111	103	130	125	132	101
Chickens	99	92	127	122	157	120
Eggs	102	95	127	122	161	123
Milk	106	99	112	108	157	120
	Numbers of livestock on farms, January 1					
All cattle	119	111	110	106	107	82
Milk cows	107	100	104	100	123	94
Hogs	112	104	142	137	105	80
Sheep and lambs ..	84	78	106	102	137	105
Horses and mules .	106	99	88	85	52	40
Chickens 3/	100	93	116	112	128	98

1/ Pre-war period for World War I, 1910-14; war period, 1915-18. Pre-war period for World War II, 1935-39; war period, 1940-43. See table 2 for additional explanatory notes.

2/ Soybean data not available prior to 1918. Census reports for 1909 and 1919 indicate that acreage and production were negligible.

3/ Excludes commercial broilers, production of which has been estimated only since 1934. Broilers are included in estimated slaughter of chickens.

Table 2.- Agricultural food production in World War I and World War II

Item	Unit	Pre-war: period: 1910-14	World War I				Pre-war: period: 1935-39	World War II			
			1915	1916	1917	1918		1940	1941	1942	1943 prel.
		Acreage and production of selected food crops									
Wheat											
Acreage harvested	1,000 acres	50,345	60,303	53,510	46,787	61,068	57,293	52,988	55,642	49,464	49,883
Yield per acre	Bu.	14.4	16.7	11.9	13.2	14.8	13.2	15.3	16.9	19.8	16.7
Production	Mil. bu.	724	1,009	635	620	904	759	813	943	981	835
Rice											
Acreage harvested	1,000 acres	663	740	843	953	1,101	1,004	1,069	1,214	1,477	1,518
Yield per acre	Bu.	35.8	35.3	46.9	36.4	36.3	49.7	50.9	42.3	44.9	46.9
Production	1,000 bu.	23,756	26,107	39,544	34,714	39,998	49,852	54,433	51,323	66,363	71,217
Potatoes											
Acreage harvested	1,000 acres	3,515	3,433	3,274	3,801	3,597	3,033	2,845	2,711	2,711	3,363
Yield per acre	Bu.	99.6	98.1	82.6	104.9	96.2	122.0	132.0	131.2	136.9	136.9
Production	Mil. bu.	350	337	270	399	346	370	378	356	371	461
Sweetpotatoes											
Acreage harvested	1,000 acres	598	627	658	725	738	800	654	746	707	923
Yield per acre	Bu.	94.4	100.9	93.5	100.4	92.9	84.9	79.8	83.3	92.4	77.6
Production	1,000 bu.	56,476	63,241	61,546	72,767	68,581	67,927	52,243	62,144	65,380	71,623
Dry Beans											
Acreage harvested	1,000 acres	920	1,085	1,173	1,832	1,625	1,702	1,904	2,023	1,970	2,542
Yield per acre	Lb. 1/	778	743	611	552	639	855	887	915	995	904
Production	1,000 bags 2/	6,548	7,251	6,450	9,036	9,281	13,606	15,732	18,503	19,608	21,400

Continued -

Table 2.- Agricultural food production in World War I and World War II - Continued

Item	Unit	Pre-war: period: 1910-14	World War I 1915	1916	1917	1918	Pre-war: period: 1935-39	World War II 1940	1941	1942	1943 prel.
		Acreage and production of oil crops									
Soybeans 3/											
Acreage harvested	1,000 acres						3,042	4,786	5,881	10,762	11,480
Yield per acre	Bu.						18.5	16.2	18.0	19.5	18.2
Production	Mil. bu.						56.2	77.5	105.6	209.6	208.8
Peanuts											
Acreage harvested	1,000 acres	481	617	878	1,314	1,326	1,659	2,040	1,914	3,425	4,191
Yield per acre	Lb.	796	779	758	752	713	741	858	772	679	668
Production	Mil. lb.	383	481	666	989	946	1,229	1,750	1,477	2,504	2,802
Flaxseed											
Acreage harvested	1,000 acres	2,262	1,116	1,298	1,881	1,783	1,451	3,182	3,275	4,402	5,843
Yield per acre	Bu.	7.6	10.1	9.1	4.5	7.2	7.6	9.7	9.9	9.2	9.4
Production	1,000 bu.	17,220	11,270	11,829	8,402	12,779	10,991	30,888	32,285	40,660	54,720
		Acreage and production of feed grains and other feed products									
Corn											
Acreage harvested	Mil. acres	101	101	101	111	102	93	87	86	89	94
Yield per acre	Bu.	26.0	28.1	24.1	26.2	23.9	25.0	28.4	31.0	35.5	31.7
Production	Mil. bu.	2,614	2,829	2,425	2,908	2,441	2,316	2,462	2,676	3,175	2,985

Continued -

Table 2.- Agricultural food production in World War I and World War II - Continued

Item	Unit	Pre-war: period: 1910-14	World War I				Pre-war: period: 1935-39	World War II			
			1915	1916	1917	1918		1940	1941	1942	1943 prel.
		Acreage and production of feed grains and other feed products - Continued									
Oats											
Acreage harvested	1,000 acres	37,139	38,802	39,098	41,604	42,464	35,761	35,334	37,965	37,899	37,944
Yield per acre	Bu.	29.4	37.0	29.1	34.7	33.6	29.2	35.2	31.1	35.9	30.2
Production	1,000 bu.	1,090	1,435	1,139	1,443	1,429	1,045	1,245	1,181	1,359	1,145
Barley											
Acreage harvested	1,000 acres	7,605	7,279	7,623	8,453	9,198	10,816	13,476	14,220	16,782	15,106
Yield per acre	Bu.	21.6	28.4	20.9	21.6	24.5	22.1	22.9	25.5	25.4	22.1
Production	Mil. bu.	164.2	207.0	159.2	182.2	225.1	238.6	308.9	362.1	426.2	333.3
All hay											
Acreage harvested	1,000 acres	67,154	69,518	72,918	71,017	71,909	67,922	71,919	71,776	72,744	72,921
Yield per acre	Tons	1.15	1.32	1.35	1.20	1.14	1.24	1.32	1.31	1.45	1.32
Production	Mil. tons	77.1	91.4	98.6	85.0	82.3	84.2	94.8	94.2	105.3	96.5
Byproduct feeds 4/	1,000 tons	6,109	7,243	7,161	7,531	7,491	8,504	9,980	10,143	12,223	12,970
Total feed grains 5/	Mil. tons	84.5	94.4	79.2	93.1	88.7	78.8	91.2	100.8	123.1	121.9
		Production of livestock products									
Total meat 6/	Mil. lb. Dr. wt.	14,380	14,886	15,907	15,501	17,341	16,169	18,995	19,493	21,460	24,172
Chickens	"	1,909	1,928	1,878	1,857	1,896	2,325	2,424	2,641	2,990	3,300
Eggs: Produced	Mil. doz.	2,579	2,741	2,640	2,539	2,567	3,335	3,629	3,828	4,420	5,000
Production per layer on farms Jan. 1	No.	86	88	87	86	86	100	101	110	113	112
Milk: Produced 7/	Mil. lb.	69.3	72.6	73.4	74.5	73.3	103.6	109.5	115.5	119.2	118.3
Milk per cow	Lb.	3,675	3,692	3,656	3,646	3,566	4,403	4,624	4,741	4,739	4,600

Continued -

Table 2.- Agricultural food production in World War I and World War II - Continued

Item	Unit	Pre-war: period: 1910-14	World War I				Pre-war: period: 1935-39	World War II			
			1915	1916	1917	1918		1940	1941	1942	1943 prel.
		Number of animals on farms, January 1									
All cattle	Mil. hd.	57.6	63.8	67.4	71.0	73.0	66.8	68.2	71.5	75.2	78.2
Milk cows	"	19.6	20.3	20.8	21.2	21.5	25.0	24.9	25.5	26.4	26.9
Hogs	"	53.1	56.6	60.6	57.6	62.9	43.9	61.1	54.3	60.4	73.7
Sheep and lambs	"	47.3	40.5	40.0	38.9	39.7	51.3	52.4	54.3	56.7	55.1
Horses and mules	"	25.2	26.5	26.5	26.7	26.7	15.8	14.5	14.1	13.7	13.4
Chickens	"	367.2	379.2	369.5	359.5	363.4	405.1	438.3	422.9	474.9	540.1
		Average dressed weight per animal 8/									
Cattle	Lb.	540	541	535	511	509	488	513	527	518	
Calves	"	83	77	78	80	82	107	107	110	116	
Hogs	"	169	165	158	160	170	172	173	182	184	
Sheep and lambs	"	38	38	38	37	37	40	41	42	41	
Chickens 9/	"	3.8	3.8	3.8	3.8	3.8	3.8	3.9	3.9	4.0	

1/ Field run. 2/ Cleaned basis. 3/ Data not available prior to 1918. The 1909 census reports 1,600 acres under cultivation, 17,000 bushels harvested. The 1919 census reports 112,800 acres under cultivation, 1,085,000 bushels harvested. 4/ Apparent disappearance of cottonseed, linseed, soybean, copra, and peanut meal, gluten feed, and wheat millfeeds. Some of the data for 1910-18 are unofficial estimates. 5/ Corn, oats, barley, grain sorghums, and quantities of rye and wheat fed to livestock. Corn marketing year beginning November 1910-18, October 1935-43; oats, August 1910-18 and July 1935-43; barley, August 1910-18 and June 1935-43. 6/ Beef, veal, lamb, mutton, and pork. 7/ Farm production. Data from 1910 to 1918 were estimated on the basis of utilization of milk. 8/ Average weight of federally inspected slaughter for cattle, calves, hogs, sheep and lambs. Not available for 1943. 9/ Excludes commercial broilers.

RETAIL PRICE CEILINGS ON FOODS, ISSUED AUGUST 19-SEPTEMBER 12, 1943

Date issued	Foods	Ceiling prices
8-19-43	Pan bread	Specific maximum prices established for D.C.; Dallas, Tex.; and Santa Barbara, Calif. Effective 8-25-43. (RSR 14, Am. 19) Formerly under GMPR
8-24-43	Neufchatel cheese	Increase of 3 cents per pound permitted. Effective 8-30-43. (MPR 280, Am. 32)
9-2-43	Prepared flour mixes	Sales by processor: Weighted average selling price, June 1-Aug. 31, 1941, plus increase in cost of ingredients and packaging materials. Distributors other than wholesalers and retailers add to (or subtract from) their old maximum price the amount of change in price of supplier. Increased cost to consumers through percentage mark-up. Effective 9-8-43. (MPR 462) Formerly under GMPR and MPR 280.
9-2-43	Beef, lamb, veal, mutton, and variety meats	Retail stores, groups 3 and 4, whose gross margin on meat sales was 19 percent or less during 1941 must sell at prices 4 percent below those of group. Effective 9-20-43. (MPR 355, Am. 10)
9-6-43	Apples and grapes	Fixed mark-up over net cost. Effective 9-16-43. (MPR 422, Am. 3; MPR 423, Am. 3)
9-9-43	Sausage	Specific cents-per-pound ceilings for several new items. Effective 9-14-43. (MPR 336, Am. 8)

A new program has been announced by the Office of Price Administration, attempting to cut the cost of living at least 2.3 percent by lowering retail prices on apples, oranges, onions, potatoes, lard, vegetable oils, and peanut butter. It is contemplated that this will be accomplished by subsidizing transportation costs and by a purchase and sales program.

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1944 OUTLOOK ISSUE

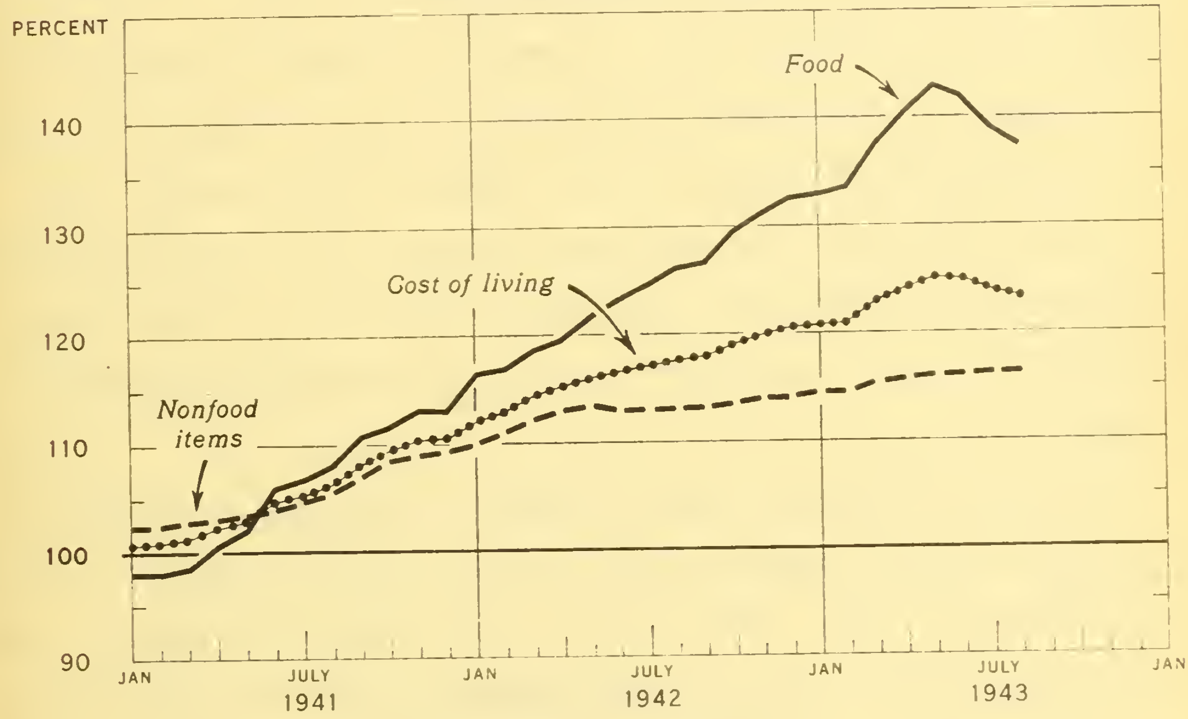
THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-10 BAE October 1943

RETAIL PRICES: TOTAL COST OF LIVING, FOOD AND NONFOOD ITEMS, 1941-43

INDEX NUMBERS (1935-39=100)



DATA FROM BUREAU OF LABOR STATISTICS

U. S. DEPARTMENT OF AGRICULTURE NEG. 43330 BUREAU OF AGRICULTURAL ECONOMICS

Retail prices of all foods combined rose sharply from January 1942 to June 1943, and then declined. Prices of other cost-of-living items have risen more gradually, especially since the General Maximum Price Regulation became effective, May 18, 1942. The recent decline in both food prices and cost of living is due in part to the rollback on maximum prices of meats, butter, and certain fresh vegetables.

THE NATIONAL FOOD SITUATION

Summary

Present indications point to a total food production in 1944 as large as or larger than the record output in prospect for 1943. However, greater noncivilian requirements probably will more than offset any increases in food output so that total supplies for civilians are not likely to exceed those of 1943 and may even be somewhat smaller. It appears that for the year 1944 as a whole, we shall continue to have an abundant supply of cereals and as large a per capita supply as in 1943 of chickens, eggs, fresh fruits and vegetables, potatoes, dry edible beans and peas. Consumption of food fats and oils as a group is likely to be maintained at the ration levels of recent months. Canned fruits and vegetables are expected to be in smaller civilian supply in the first half of 1944 than in the same period this year, but in the second half the supplies may be larger than in the second half of 1943. Red meats and dairy products, however, are expected to be in shorter civilian supply than this year.

This year civilian per capita consumption of all foods is expected to average about 5 percent above the 1935-39 level, but about 5 percent below the record consumption in 1941. The 1943 civilian per capita food supply is richer than in 1935-39 in all of the essential nutrients and with the exception of vitamin A and ascorbic acid, the vitamin and mineral content of the foods consumed will be at least as high as in 1941 and 1942. The net effect of smaller civilian supplies of meats and dairy products in 1944 probably will mean a diet slightly lower in calories, protein, and calcium. However because of higher levels of enrichment of bread and flour now in effect, the diet may contain more iron and the B vitamins.

Total food production in 1943 is estimated to be 5 percent above 1942, and 32 percent above 1935-39. The record output of livestock products, approximately 10 percent above 1942, will more than offset a decline in food crop production.

The outlook for livestock products in 1944 is dominated by the prospective feed situation. Since the beginning of the war, livestock numbers have been increasing and on January 1, 1944, the numbers will be at a record high level. This sets the stage for a substantial increase in total production of livestock products next year. However, the large feed stocks, accumulated prior to our entrance into the war, are being reduced and local feed shortages have already developed this year. The total supplies of feed for the year beginning October 1 will be the second largest on record. However, disappearance per animal unit is likely to be only about the same as in 1940 even if a considerable part of the reserve stocks of feed grains and feed wheat now on hand is consumed before the close of the 1943-44 marketing year. This situation will make it difficult to obtain any significant increases in livestock production next year. But, with efficient management of the feed supply, the output of livestock products could be maintained at approximately the 1943 level.

The number of hogs on farms January 1, 1944 will be the largest in our history, and even if the 1944 spring pig crop is smaller than this year's crop, as is likely, hog slaughter may still be several million head greater than in 1943. The number of cattle and calves on farms on January 1 likewise will be of record size, and in view of the limited feed supply and high feed costs, an increase in slaughter appears probable. The number of layers on farms at the beginning of 1944 is expected to be at least 8 percent larger than the record number on January 1, 1943 and egg production in 1944 probably will be at least as large as in 1943, if not larger.

The number of chickens raised in 1944 probably will be somewhat smaller than this year, but with a larger slaughter of chickens culled from laying flocks, total production of chicken meat should be about the same as the all-time high in 1943. A milk production goal of 122 billion pounds has been suggested by War Food Administration for 1944 -- about 4 billion pounds larger than the expected production in 1943. In view of the prospective tight feed situation and competition from the large number of other livestock on farms, an output of this size will be difficult to obtain without providing more feed for the dairy enterprise and taking actions which will increase returns to producers. Unless such actions are taken, production may fall below the output during this year.

The War Food Administration has requested farmers to plant 380 million acres in 1944 -- 16 million acres more than were planted in 1943. The WFA request is that a larger proportion of the total acreage planted be devoted to food crops than in 1943. Barring droughts, the production of food crops in 1944, therefore, should be as large as or larger than in 1943.

The proportion of the 1944 production that will be allocated for non-civilian uses will depend to a large extent on military developments. As more Axis-held territories are liberated by the Allies, relief shipments, especially to continental Europe, can be expected to increase. In any event, military and lend-lease requirements next year probably will be at least as great as this year. At the same time, the civilian demand for food -- i. e., the amount which civilians would be willing to buy at prevailing prices -- will be equal to or even greater than in 1943.

-- October 16, 1943

Table 1.- Volume of agricultural production for sale and for consumption in the farm home and civilian per capita food consumption, 1941-43, with percentage comparison

Index numbers (1935-39 = 100)

Production	1941	1942 1/	1943 2/	1943 as percentage of	
				1941	1942
Food grains 3/	131	139	108	82	78
Truck crops 4/	116	127	115	99	91
Fruits 5/	113	115	104	92	90
Vegetables, excluding truck crops 6/	100	106	126	126	119
Sugar crops 7/	97	110	88	91	80
Total food crops 8/	116	124	113	97	91
Meat animals 9/	118	133	150	127	113
Poultry 10/	116	131	153	132	117
Dairy products 11/	110	114	113	103	99
Total food livestock	115	126	138	120	110
Total food production	115	126	132	115	105
Total agricultural production	113	125	128	113	102
Civilian per capita food consumption	111	108	105	95	97

1/ Revised.

2/ Production indexes are based on the October crop report and estimated marketings and home consumption of livestock and livestock products for the calendar year 1943.

3/ Includes wheat, rye, rice, and buckwheat.

4/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloups, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes and watermelons) and truck crops for manufacture (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).

5/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.

6/ Includes dry edible beans, potatoes, and sweetpotatoes.

7/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.

8/ Includes peanuts in addition to the other crops.

9/ Includes cattle and calves, sheep and lambs, and hogs.

10/ Includes eggs, chickens, turkeys, and broilers.

11/ Includes wholesale milk, retail milk, butterfat, and farm butter.

Table 2.- Apparent civilian consumption on a per capita basis, 1935-39 average, 1940, 1941, 1942, and 1943 (preliminary), with percentage comparisons 1/

Commodity	1935-39	1940	1941	1942	1943	1943 as a percentage of	
						1935-39	1942
	Lb.	Lb.	Lb.	Lb.	Lb.	Pct.	Pct.
Meat (dressed weight)							
Beef and veal	63.2	62.5	69.0	68.3	58.7	93	86
Lamb and mutton	6.7	6.6	6.9	7.0	5.6	84	80
Pork (excluding lard)	56.5	72.9	67.3	59.4	64.3	114	108
Total meat	126.4	142.0	143.2	134.7	128.6	102	95
Fish							
Fresh and frozen (dressed weight)	6.4	6.6	7.1	5.6	4.5	70	80
Canned fish and shellfish	5.0	4.2	3.7	3.2	2.5	50	78
Cured fish	1.1	1.0	.9	.8	.7	64	88
Poultry products							
Eggs 2/	37.5	39.9	39.3	40.1	43.4	116	108
Chickens (dressed weight)	18.0	18.1	19.5	21.9	28.2	157	129
Turkeys (dressed weight)	2.7	3.6	3.6	3.8	3.4	126	89
Dairy products							
Total milk	806.5	826.0	817.4	856.4	788.3	98	92
Cheese	5.6	6.0	6.0	6.4	4.9	88	77
Condensed and evaporated milk	16.8	19.3	18.9	19.0	17.0	101	89
Ice cream	9.6	11.3	13.7	16.0	12.0	125	75
Fluid milk and cream 3/	342.3	345.4	353.7	376.0	403.4	118	107
Fats and oils							
Butter, farm and factory	16.8	17.0	16.0	15.7	13.3	79	85
Lard	11.0	14.8	14.3	13.6	13.8	125	101
Compounds and vegetable cooking fats (fat content)	11.9	9.1	10.5	8.9	8.7	73	98
Margarine (fat content)	2.3	1.9	2.2	2.3	3.4	148	148
Other food products and uses (fat content)	6.3	7.6	8.4	8.4	7.7	122	92
Total fats and oils	48.3	50.4	51.4	48.9	46.9	97	96
Fruits							
Fresh							
Citrus	49.1	56.7	56.9	53.1	56.9	116	107
Apples	4/43.1	4/39.9	32.3	28.9	23.5	4/	81
Other fruit	59.9	57.9	60.0	48.1	36.3	61	75
Canned fruits	15.0	17.6	19.2	15.8	8.9	59	56
Canned juices	5.4	8.4	9.2	6.2	7.2	133	116
Frozen	.7	1.2	1.3	1.7	1.4	---	---
Dried	5.7	6.4	4.6	4.2	4.5	79	107

Continued -

Table 2.- Apparent civilian consumption on a per capita basis, 1935-39 average, 1940, 1941, 1942, and 1943 (preliminary), with percentage comparisons 1/ - Continued

Commodity	1935-39	1940	1941	1942	1943	1943 as a percentage of	
						1935-39	1942
	Lb.	Lb.	Lb.	Lb.	Lb.	Pct.	Pct.
Vegetables							
Fresh	237.0	241.0	243.0	251.0	223.0	94	89
Canned	31.4	36.4	39.5	44.7	35.6	113	80
Potatoes	130.0	132.0	121.2	123.8	141.4	109	114
Sweetpotatoes	23.4	17.5	20.8	22.4	24.2	103	108
Beans, dry edible	9.0	9.4	8.8	9.5	10.9	121	115
Sugar (refined)	97.0	92.4	105.0	89.0	75.0	77	84
Grains							
Wheat	222.4	219.1	220.8	223.7	222.7	100	100
Rye	3.9	3.8	4.3	4.7	4.8	123	102
Rice (milled)	6.2	6.1	5.5	6.2	5.9	95	95
Corn	57.6	58.6	64.8	74.7	74.0	128	99
Oats	6.9	7.0	7.1	7.9	8.0	116	101
Barley	21.6	20.1	22.6	27.2	28.0	130	103
Beverages							
Coffee	14.0	15.5	15.9	13.3	13.5	96	102
Tea	.7	.7	.8	.5	.4	---	---
Cocoa	4.4	4.9	4.8	3.9	3.3	75	85
	Relative nutritive value, 1935-39 = 100 5/						
Food energy	100	104	107	105	102	102	97
Protein	100	105	107	107	107	107	100
Fat	100	108	108	106	104	104	98
Carbohydrates	100	102	108	105	98	98	93
Calcium	100	105	107	111	113	113	102
Phosphorus	100	104	106	107	108	108	101
Iron	100	104	104	106	108	108	102
Vitamin A	100	105	105	106	102	102	96
Ascorbic acid	100	105	105	105	100	100	95
Thiamine	100	110	108	115	131	131	114
Riboflavin	100	106	107	109	111	111	102
Niacin	100	107	108	108	109	109	100

1/ Calendar years except for canned fruits, canned vegetables, and dried fruits which are on a pack-year basis and potatoes, sweetpotatoes, and dry beans which are on a crop-year basis. For detailed footnotes see table 4. 2/ In terms of number of eggs the apparent per capita consumption was 300 in 1935-39, 319 in 1940, 314 in 1941, 320 in 1942, and 347 in 1943. 3/ Fluid milk equivalent. 4/ Includes noncommercial which is not included in later years. Percentage comparison with 1943 is omitted since figures are not comparable. 5/ Calculated by Bureau of Agricultural Economics and Bureau of Human Nutrition and Home Economics. For 1942 and 1943, the quantities of iron, thiamine, and riboflavin used in enrichment of flour have been included.

MEATS

The Situation in 1943

The output of meats this year is expected to be about 24 billion pounds, 13 percent above 1942 and 50 percent above the average in 1935-39. Military and lend-lease requirements for the year as a whole probably will amount to about 25 percent of the total meat production: Revised estimates now indicate that the per capita meat consumption in 1943 will average 128.6 pounds. This is 4.6 pounds more than the previous estimate and 5.9 pounds less than the consumption in 1942.

The 1943 spring pig crop was estimated at 74 million head, 22 percent larger than the record 1942 crop. The fall pig crop also is expected to be larger than in 1942. The June 1 breeding intentions of farmers indicated a 25 percent increase, but the actual farrowings may not be as great. Marketings of sows this summer were about 50 percent larger than a year ago indicating that some liquidation of breeding stock may be in progress. Total pork production in 1943 may reach 13 billion pounds, by far the largest on record. Civilian per capita consumption of pork would be about 64 pounds, approximately 5 pounds greater than in 1942.

The total number of cattle and calves on farms January 1, 1943 was 78.2 million head, 3 million head more than the previous year. Federally inspected slaughter of cattle and calves to date has been about 2 million head below last year although nonfederally inspected slaughter was larger than usual. If slaughter during the last quarter of 1943 exceeds that of last year, as now seems likely, the total slaughter in 1943 may be above tha of 1942. Civilian per capita consumption of beef and veal, however, is expected to be only 59 pounds compared with about 68 pounds in 1942.

The total number of sheep and lambs on farms January 1, 1943 was 55.1 million head, 1.6 million head smaller than in 1942. Shortages of skilled help and the uncertainty of obtaining concentrate feeds have resulted in heavy marketings of ewes during recent months from the Western States. Total slaughter of sheep and lambs in 1943 may be slightly below 1942 but the second largest on record.

Livestock: Number on farms, January 1, and slaughter, 1935-39 average, 1940, 1941, 1942, and 1943

Item	1935-39 average	1940	1941	1942	1943 prel.
	Mil. head	Mil. head	Mil. head	Mil. head	Mil. head
Cattle and calves:					
Total number on farms Jan. 1 1/	66.8	68.2	71.5	75.2	78.2
Slaughter					
Cattle, federally inspected	10.0	9.8	10.9	12.3	11.4
noninspected	5.0	5.2	5.5	5.3	7.2
Total	15.0	15.0	16.4	17.6	18.6
Calves, federally inspected	5.8	5.4	5.5	5.8	4.5
noninspected	3.9	3.7	3.8	3.7	5.2
Total	9.7	9.1	9.3	9.5	9.7
Total slaughter	24.7	24.1	25.7	27.1	28.3
Total number on farms end of year	66.7	71.5	75.2	78.2	80.8
Sheep and lambs:					
Total number on farms Jan. 1	51.3	52.4	54.3	56.7	55.1
Slaughter					
Federally inspected	17.5	17.4	18.1	21.6	20.7
Noninspected	4.3	4.2	4.2	3.8	4.0
Total slaughter	21.8	21.6	22.3	25.4	24.7
Total number on farms end of year	51.5	54.3	56.7	55.1	52.9
Hogs:					
Total number on farms Jan. 1	43.9	61.1	54.3	60.4	73.7
Slaughter					
Federally inspected	34.3	50.4	46.5	53.9	64.6
Noninspected	22.5	27.2	24.9	24.0	28.6
Total slaughter	56.8	77.6	71.4	77.9	93.2
Total number on farms end of year	48.3	54.3	60.4	73.7	88.0

1/ Includes dairy cattle.

Prospects for 1944

Meat production in 1944 may be as high as the record production in 1943. Present estimates indicate that noncivilian requirements for meat in 1944 may be about 25 percent higher than in 1943 so that supplies for civilians probably will be smaller. On the other hand, civilian demand for meat at present prices may be as high as 170 pounds per capita or over 40 pounds more, than the average consumption per person in 1943.

While the civilian supply of meats in prospect for 1944 may be somewhat smaller than this year, it may be more evenly distributed. Machinery to control black market operations will be better organized through the new licensing program of the War Food Administration, stricter enforcement of regulations by the Office of Price Administration, and the coordinating efforts of the War Meat Board.

Expectations are that the 1944 spring pig crop will be smaller than this year's crop because of the smaller feed supply and less favorable hog-corn price ratio. However, because of the large number now on farms hog slaughter in 1944 may still be several million head higher than in 1943.

The total number of cattle and calves may be above 80 million head on January 1, 1944, or over 2 million head higher than on January 1, 1943. In relation to the prospective feed supply, and high feed costs, cattle numbers in 1944 will be large so that an increase in slaughter appears likely.

If the present trend in marketings of sheep and lambs continues, sheep numbers on farms January 1 may be 2 million head below a year ago. As a result of heavy eue slaughter during recent months the lamb crop in 1944 also may be smaller than in 1943. Consequently slaughter of sheep and lambs next year is likely to be smaller than in 1943.

POULTRY

The Situation in 1943

Egg production in 1943 is expected to reach about 5 billion dozens, 13 percent above the record in 1942 and 50 percent above the average in 1935-39. Noncivilian uses will account for a little over 20 percent of the production in 1943. However, civilian egg consumption will be of record size and may average about 347 eggs per person. This is 8 percent above the consumption in 1942 and 16 percent above the average in 1935-39. In the first half of 1943 prices of eggs were slightly below ceilings but so far in the second half prices of all eggs, except low grade and small eggs, have been seasonally higher than in the first half and have been firm at ceiling levels reflecting an increased civilian demand and some seasonal decline in supplies.

On the basis of prospective production of shell eggs, the quantity now scheduled for drying and present storage stocks, it appears that supplies for civilians this fall and early winter will be the largest on record. However, even with these quantities, demand may continue to exceed supplies at ceiling prices in some markets. Recent actions by the War Food Administration will tend to increase civilian supplies of eggs for this fall over what otherwise would result. Announcements of forthcoming actions, made in early October, consisted of (1) termination of FDO 40 which was designed to restrict the storage of shell eggs largely to governmental uses and (2) cancellation of as much as 50 percent of forward contracts for dried egg calling for delivery to FDA in November, December and January. The latter is being carried out on a voluntary basis and therefore may not approach 50 percent of outstanding contracts.

Production of chicken meat in 1943 will be of record size. The total slaughter (including commercial broilers) probably will be 3.8 billion pounds (dressed weight), about 27 percent above 1942 and over 60 percent above the average in 1935-39. Production of commercial broilers in 1943 may reach 725 million pounds (dressed weight) or 35 percent larger than the production in 1942. Purchases of chicken for the military have been relatively small and because of shortages of red meat, civilian consumption of chicken in 1943 will exceed all previous records. Present estimates indicate that the per capita consumption of chicken meat will reach 28 pounds (dressed weight), over 6 pounds more than the high consumption in 1942.

Civilian supplies of chickens in the last 3 months of this year will be the largest on record for any 3 months in our history. Supplies of turkeys this fall, on the other hand, will be smaller than a year earlier as a result of smaller production and large quantities taken for military uses. The embargo on sales of turkey for civilian use is still in effect and will not be lifted until overseas military needs are met in full, and commitments are received for requirements for United States Military camps.

Poultry and eggs: Number of chickens on farms, slaughter, and production of eggs, 1935-39 average, 1940 through 1943

Item	1935-39	1940	1941	1942	1943 prel.
	Mil. head	Mil. head	Mil. head	Mil. head	Mil. head
Total number of chickens on farms Jan. 1	405.1	438.3	422.9	474.9	540.1
Number of layers on farms Jan. 1	364.4	392.7	381.4	426.2	487.1
Slaughter	587.4	554.2	584.0	637.5	795.0
Total number on farms end of year	414.8	422.9	474.9	540.1	599.0
Number of layers on farms end of year	372.8	381.4	426.2	487.1	540.8
	Mil. doz.	Mil. doz.	Mil. doz.	Mil. doz.	Mil. doz.
Total production of eggs	3,335	3,629	3,828	4,420	5,000

Prospects for 1944

Total egg production in 1944 probably will be at least as large as in 1943 if not larger, and despite expected sizeable war requirements, civilian consumption of eggs is likely to be at least as large as this year. The number of layers on farms at the beginning of 1944 is expected to be at least 8 percent larger than the 487 million head at the beginning of 1943. This provides a basis for a further large increase in total egg output. However, with a tight feed situation in prospect, particularly in the deficit-feed areas, some reduction in numbers of layers is likely to take place in the second half of 1944. With a heavier than normal culling of flocks in prospect, the average production per layer will tend to be somewhat higher and may offset to some extent the smaller supply of feed per bird.

The number of chickens raised in 1944 probably will be somewhat smaller than this year and commercial broiler production, which is concentrated in deficit feed areas, may also be smaller. However, with a larger slaughter of chickens from laying flocks in prospect, supplies of chicken meat should be about the same as the all-time high in 1943.

Turkey production in 1944 may be about as large as this year. Unlike broilers, turkeys are raised largely in the feed surplus sections of the country.

DAIRY

The Situation in 1943

Total milk production is expected to reach about 118 billion pounds in 1943, one billion pounds less than a year ago. The rate of production in the first half of this year was about equal to that of 1942. But, as a result of poorer pastures, less favorable price ratios, and shortages of feed concentrates, production in the second half of the year has been declining. However, consumption of fluid milk in 1943 has increased considerably and is expected to average in urban areas 15 percent above the 1942 level and 34 percent above the 1935-39 level. The diversion of milk into consumption channels as fluid milk has resulted in curtailed production of manufactured dairy products. For the year as a whole, the output of all manufactured dairy products, with the exception of butter and dried whole milk will be substantially below 1942.

Not only is the production of dairy products smaller in 1943 than last year but noncivilian uses are substantially larger. Present estimates indicate that the combined military and lend-lease requirements this year will account for 14 percent of the total output of dairy products (milk equivalent). As a result, the civilian per capita consumption of all major dairy products, except fluid milk, will be materially smaller this year than in 1942.

To protect dairy farmers against increases in prices of dairy feeds, the War Food Administration announced a program of Government payments to dairy farmers effective for the period October 1 through December 31, 1943. Payments will range from 25 to 50 cents per hundredweight for milk delivered as whole milk and from 3 to 6 cents per pound of butterfat where cream is sold. However, in areas where other payment programs are already in effect, these new payments will be adjusted to take such programs into account. The payment program was inaugurated in an attempt to stop the downward trend in milk production.

Production of creamery butter in August was 152 million pounds, 9 percent less than in August 1942. Indications are that September production declined about seasonally from August, and continued below last year. Supplies of butter for civilians were extremely short in most areas, especially the East, despite the measures undertaken by the Government to ease the situation. Effective October 3, the point value of butter was raised again by the Office of Price Administration and is now 16 points per pound. At about the same time the War Food Administration announced that there will be no Government buying of creamery butter until April 1, 1944, and that the entire production of creamery butter during this period will be made available to civilians.

The production of American cheese in August was 10 percent smaller than in the same month a year earlier but in September, the production probably will be only 5 percent smaller than in the corresponding month last year. Stocks of American cheese increased 23 million pounds during August and totaled 173 million pounds on September 1. Stocks for civilians, however, are expected to be less than 69 million pounds compared with an average of 130 million pounds for the period 1938-42. The Office of Price Administration announced a 1 point increase in the point values of all cheeses other than American for the ration period beginning October 3. American cheese continues at 8 points per pound while the cream cheese group went up 3 points and other cheeses 6 points.

Milk cows on farms, milk production per cow, and total milk production, United States, 1937-41 average, 1940-43

Year	Milk cows on farms	Milk production per cow	Total milk production
	Thousands	Pounds	Mil. lb.
1937-41 average	23,575	4,576	107,903
1940	23,684	4,624	109,510
1941	24,361	4,741	115,498
1942	25,159	4,739	119,240
1943 1/	25,670	4,600	118,000

1/ Estimated.

Prospects for 1944

The War Food Administration has suggested that 1944 total milk production reach 122 billion pounds, -- about 4 billion pounds more than the expected production in 1943. The State goals are now being discussed with State War Boards and the final national goal will not be announced until each State Board has checked and, where necessary, revised its State goal.

The suggested production can be obtained if the number of cows is increased by 2 percent above the average for the year 1943, and production per cow is increased 50 pounds above the 1943 level. Considering the number of cows and heifers now on farms, the desired increase in cow population is feasible provided the culling of cows and heifers is no greater than normal. However, to get any significant increases in milk production per cow as well as an increase in cow population, a larger feed supply than was available in 1943 will be required. In view of the prospective tight feed situation, and competition from the large number of other livestock on farms, the requested increases in milk production will be difficult to achieve without providing more feed for the dairy enterprise and taking actions which will increase returns to producers.

Present indications are that even with imports of feed stuffs and reduction of stocks to a minimum, the greatest possible disappearance of feed per animal unit in 1943-44 will not exceed the 1937-41 average. Under these conditions, cow numbers probably will average only as high as in 1943. If the feed supplies in 1944 are distributed among the several classes of livestock as in 1943, the total milk output in 1944 is not likely to be more than 116 billion pounds, approximately 2 billion pounds less than that expected in 1943.

While the prospective tight feed situation will make it difficult to obtain a significant increase in total milk production in 1944, increases in milk for human consumption may be obtained if farmers sell milk as whole milk at wholesale rather than as separated cream with the skim milk (rich in protein and minerals) fed to livestock or wasted. The present Government payment program attempts to establish such a trend by providing a comparatively higher rate for milk sold as whole milk than for the milk equivalent of butterfat sold in cream. However, there are some limitations to the amount of milk that can be diverted from sales of farm separated cream to sales of whole milk, and the maximum diversion which seems possible in 1944 is about 3 billion pounds of milk equivalent, most of which would come from the Midwestern States.

Even if consumption of fluid milk is held at the present level some further decline in the production of manufactured dairy products may occur in 1944. Largest declines on a percentage basis are expected to occur in creamery butter and American cheese. Production of dried skim milk for human consumption may be considerably larger than in 1943 but probably smaller than the record production in 1942.

Present estimates indicate that the total civilian demand at ceiling prices for dairy products (milk equivalent basis) may reach 124 billion pounds in 1944. But with large noncivilian requirements and a prospective smaller production, the total civilian supply may be only 95 billion pounds, compared with about 99 billion in 1943 and 104 billion pounds in 1935-39.

FATS AND OILS

The Situation in 1943

The combined production of food and nonfood fats and oils in the United States may total about 11 billion pounds in 1943 compared with about 10 billion pounds in 1942. The production of edible fats and oils including butter is expected to reach about 8 billion pounds -- 10 percent above 1942 and 29 percent above the 1935-39 average.

Military requirements and exports in 1943 probably will account for 20 to 25 percent of the total production of edible fats and oils. With Government limitation orders and rationing of food fats in effect, civilian consumption in 1943 will average about 47 pounds per capita compared with 49 pounds in 1942 and about 48 pounds in 1935-39. The decline in total civilian consumption is mainly a result of a smaller per capita civilian supply of butter. Butter consumption in 1943 is expected to average only 13.3 pounds compared with 15.7 pounds in 1942 and 16.8 pounds in 1935-39. Consumption of margarine, on the other hand, has increased and probably will average over 1 pound more per person than last year when it was 2.3 pounds fat content, or 2.9 pounds in terms of finished weight.

Prospects for 1944

Since our loss of oil imports from the Pacific, the acreage of oil-bearing crops has been greatly expanded in the United States and further expansion in acreage probably will take place in 1944. The output of vegetable oils in the coming year, therefore, is expected to be larger than this year and, with the exception of butter, animal fat production may be about the same.

Lend-lease shipments of fats and oils to the United Kingdom and Russia have been increasing and are expected to be larger in 1944 than in 1943. In addition, relief shipments of fats and oils to continental Europe may become necessary with the Allied liberation of territories now under Axis domination. Supplies for civilians, therefore, are not likely to be increased, and civilian consumption per capita may be maintained at the current ration level. On the basis of disappearance during the past few months, this would be about 44 pounds per capita for the year.

FRUITS

The Situation in 1943

The combined deciduous and citrus fruit production this year is expected to be 10 percent smaller than last year. Production of 8 major deciduous fruits is estimated to be 16 percent smaller than a year ago, whereas production of citrus fruit (crops from the 1943 bloom) is expected to be about equal to the large crop of a year earlier. A grape crop larger than any previous record and 16 percent larger than that of 1942 is being harvested. The crop of plums and prunes is expected to be 13 percent larger than in 1942. Compared with last year, the commercial crop of apples is estimated to be 30 percent lower; peaches, 37 percent lower; and pears, 23 percent lower. Production of these crops is particularly small in the Eastern half of the United States.

The canned packs of cherries, apricots, and peaches are estimated to be considerably smaller than a year ago. The 1942-43 canned pack of grapefruit juice was the largest on record and the pack of canned pears may be about as large as last year.

Prospects for 1944

Total per capita civilian supplies of fresh fruits are estimated to be considerably smaller for 1943-44 than for 1942-43. But with normal yields the crop of fresh fruits next year will be larger and supplies for civilians during 1944 should average somewhat above this year. Supplies of apples going into storage for consumption during winter and early spring probably will not exceed three-fourths of a year earlier. However, with normal yields, supplies of apples in the summer and fall of next year will be larger. The quantity of fresh citrus fruit from the 1943 bloom for civilians next year is expected to be as large as this year.

Civilian supplies of canned fruit juices are expected to be somewhat larger than a year ago, but canned fruits in 1943-44 probably will be only three-fifths as large. With a larger pack of canned fruits in prospect for next season, however, civilian supplies during 1944 may be only slightly less than in 1943.

VEGETABLES

The Situation in 1943

Thus far this season the total production of commercial truck crops for fresh market has been about 10 percent below last season although approximately average. The smaller crops, compared with 1942, are largely due to decreases in acreage. Cabbage, cauliflower, celery, cucumbers, lettuce, cantaloups, and watermelons have been in far smaller supply this year than last. Only two of the major truck crops for fresh shipment, snap beans and carrots, have been substantially larger than in 1942.

Following the usual seasonal pattern, fresh market supplies of vegetables this year were most abundant in late summer. Late summer and early fall crops this season more nearly have approached the production level of 1942 than did the spring and early summer crops. Production of fresh market crops in the next few weeks probably will be about 4 percent smaller than in 1942. Carlot shipments of truck crops into the fresh market the latter part of September and early October have been somewhat larger this season than last, primarily because of unusually heavy early seasonal movement of the late cabbage and onion crops. Cabbage, carrots, lettuce, and onions are expected to continue to move to market in heavy volume during the next few weeks, and tomatoes, snap beans, cauliflower, spinach, beets, and celery in moderate volume. Per capita consumption of commercial fresh vegetables for the 1943 season as a whole is indicated to be about 15 to 20 percent below that of 1942. It is estimated, however, that victory garden production has offset to a large extent smaller commercial supplies.

Production of truck crops for processing is expected to be about 9 percent smaller this season than last. The tonnages of snap beans and beets for processing are estimated to be larger than in 1942, but tonnages of all other major processing vegetables probably will be smaller. Supplies of tomatoes and of cabbage for kraut are substantially below those of last year. Because of the smaller crops available for processing, the canned vegetable pack also is expected to be smaller than last season.

A record crop of potatoes is indicated for 1943. Production in the "early" and "intermediate" States totaled 100 million bushels, or 19 percent above last year's. The late crop, supplying most of the potatoes from now until late next spring, is estimated at 369.4 million bushels, 29 percent larger than the late crop of 1942. Total supplies are about one-fourth larger this season than last. Noncivilian requirements, however, also are considerably larger than in 1942-43. Consequently per capita civilian supplies may be only about 10 to 15 percent larger for the 1943-44 season than the per capita consumption in 1942-43. Increased demand by civilian consumers probably will be more than adequate to absorb these larger supplies.

A sweetpotato crop of 74.7 million bushels is in prospect this season. This is substantially greater than was indicated September 1, and about 14 percent above the crop last year. Larger noncivilian requirements are expected to absorb most of the increase in the 1943 supply so that civilian per capita consumption during the 1943-44 season probably will be only slightly larger than in 1942-43.

A record dry bean crop of about 22.8 million 100-pound bags is being harvested this season. This will be 16 percent larger than the previous record crop of 1942. Production of all major varieties with the exception of the red kidney bean is expected to be about as large as or larger than a year ago. Despite smaller supplies carried over from last season and increased noncivilian requirements, civilian supplies of dry beans during the 1943-44 season are expected to be substantially larger than in 1942-43 and probably adequate to meet demand.

A 1943 crop of approximately 9.5 million bags (100-pound bags, uncleaned) of dry field peas is indicated for the United States — a crop about one-third larger than last year and three and one-half times as large as the 10-year (1932-41) average. Because of the large crop this season, dry peas have been removed from the foodstuffs being rationed.

Prospects for 1944

An unprecedented large demand for fresh and processed vegetables is in prospect for 1944. Substantial increases in acreage of truck crops for fresh market and for processing would be required if all demands from civilian and noncivilian sources were to be met Considering the various production and marketing factors, an acreage expansion to meet all requirements in 1944 would be difficult to obtain. Approximately a 5 percent increase in acreage of commercial truck crops for processing and a 10 percent increase in acreage of commercial truck crops for fresh market appears feasible. Such an expansion, assuming average yields, would result in supplies of commercial fresh and canned vegetables considerably above those of this season. A proportionately larger acreage increase in the winter and spring fresh vegetable producing areas than in the summer and fall areas seems probable. Processing probably can expand most readily in the Northeastern and Southern States. Indicated requirements can serve as a guide in the 1944 production program. Such requirements are especially heavy for snap beans, lima beans, carrots, cabbage, green peas, onions and tomatoes among the fresh market crops and for snap beans, lima beans, beets, spinach, and cabbage among the processing crops.

The carry-over stocks of canned vegetables from the 1942-43 season were at a low level. Per capita civilian supplies of canned vegetables during the 1943-44 season, therefore, are indicated to be only about four-fifths as large as the quantity consumed during 1942-43. If a larger pack of canned vegetables is obtained next year, as now seems likely, civilian per capita supplies for the calendar year 1944 may average about the same as this year. It also appears that civilian supplies of both canned and fresh vegetables in 1944 will again be augmented by production in Victory gardens.

Requirements for potatoes in 1944 are expected to continue at an extremely high level. Supplies the first half of the year are expected to be substantially larger than during the first half of 1943. A small increase in acreage in 1944, compared with this year, is probable; and unless yields are exceptionally low, supplies the second half of 1944 will be as large as those in the latter half of this year. Requirements in 1944 for sweetpotatoes are also considerably above those for 1943. A 5 to 10 percent expansion in acreage in 1944 appears likely, primarily in the major producing States in the South.

Indications point to a larger demand for dry edible beans and dry field peas in 1944-45 than in 1943-44. A substantial increase in acreage of each of these crops may occur -- possibly as much as 15 to 20 percent above that of 1943. However, a large part of such an increase must take place in new areas, largely dry land, as the acreage of beans and peas in many established acreas cannot be expanded materially if adequate acreages of other crops are to be maintained. A reduced yield is probable on such lands. Proportionately largest increases are probable in the New England, North Central, and Far Western States.

WHEAT, RYE AND RICE

The Situation in 1943

The October 1 crop report indicated a total wheat crop of 836 million bushels -- practically unchanged from a month earlier. This is 145 million bushels below the near-record crop of last year but 98 million bushels above the 1932-41 average. The carry-over on July 1 was 618 million bushels yielding a total prospective domestic supply of 1,454 million bushels. A supply of this size is second only to the record supply of 1,613 million bushels in 1942-43.

Of the total domestic supply, approximately 540 million bushels are expected to be used for food in 1943-44, 100 million bushels for alcohol, 80 million bushels for seed, 390 million bushels for feed, and 50 million bushels for exports. Wheat is being imported to supplement the quantity of domestic wheat for feed.

The August 1 estimate of rye production was indicated at 33.3 million bushels. With stocks of rye at the beginning of the 1943-44 year amounting to 42.4 million bushels, the total domestic supply for 1943-44 is estimated at 76 million bushels, compared with 88 million in 1942-43 and an average of 57 million in 1934-41.

The rice production, indicated October 1 at 69 million bushels, is 2 million bushels below the estimate of a month earlier. The indicated production this year is 4 percent above the record crop in 1942 and 46 percent above the 1932-41 average. A crop of this size is expected to cover about average domestic requirements as well as take care of lend-lease and regular exports and shipments, and leave a moderate carry-over at the end of the 1943-44 marketing year.

Prospects for 1944

The War Food Administration has urged farmers to step up the wheat acreage in 1944 to 68 million acres. This is about 14 million acres larger than the acreage seeded for the 1943 crop but about the same as the 1932-41 average. Assuming average yields this acreage would yield a crop of about 850 million bushels -- 15 million bushels above estimated 1943 production.

An increase in acreage over 1943 is requested because of the large quantities needed for animal feed and alcohol production. The unprecedented number of livestock on farms makes it necessary to utilize substantial quantities of wheat for feed, and alcohol is used in the manufacture of synthetic rubber and smokeless powder. Even with a production of 850 million bushels in 1944 only moderate supplies would be available for regular exports, European relief, and lend-lease purposes. However, supplies in Canada though smaller than in 1943 will be adequate to meet large overseas requirements, and, in addition, exportable surpluses in Argentina and Australia will be available as the shipping situation is eased.

Demand for rye has not increased materially as a result of the war. Production in recent years has been high and relatively large stocks are on hand. Special emphasis, therefore, has not been placed on rye production in the total wartime food production program. The War Food Administration has suggested that the acreage of rye for harvest be maintained in areas where it produces more feed per unit of resources than alternative crops. This would mean a slightly smaller harvested acreage than the 2.9 million acres indicated for the 1943 crop. With average yields, an acreage of this size would produce a crop of about 33 million bushels. This would provide for the estimated need of 11 million bushels for food, 8 million bushels for seed, and leave a sizable quantity for feeding, alcohol, and carry-over.

The rice goal for 1944 has been announced at 1.54 million acres, which is the same as seeded in 1943. With average yields an acreage of this size would result in a crop of 71 million bushels, which would be enough to take care of estimated needs for food, seed, lend-lease, exports and shipments, and leave a small carry-over at the end of the year.

FEED

Situation 1943-44

Prospective feed supplies for 1943-44 are, with the exception of last year, the largest on record. The total supplies of feed concentrates, including feed grains, wheat and rye for feed, and principal byproduct feeds, are 4 percent smaller than in 1942-43, but 19 percent above the 1937-41 average. Prospective supplies of feed grains, including wheat and rye for feeding, total 147 million tons, 3 million tons greater than was indicated in August but 5 percent below the 1942-43 supply. Domestic feed-grain supplies for 1943-44 will be supplemented by imports of feed wheat, oats, and barley from Canada, the total of which may be equivalent to about

120 million bushels of corn. Prospective supplies of vegetable and animal protein feeds, combined in terms of oilmeal equivalent, total 11.6 million tons, slightly above the record supply last year. Hay supplies are 6 percent smaller than in 1942-43 but 8 percent above the 1937-41 average, and are generally adequate for the increased number of livestock on farms except in the drought areas of the East and South.

In relation to the number of livestock proposed under the 1944 production program, the indicated supply of all feed concentrates for 1943-44 will be less than in the year just closed, but about the same as the quantity fed per head in 1940, provided a considerable part of the reserve stocks of feed grains and feed wheat now on hand is consumed before the close of the 1943-44 marketing year. In some areas, disappearance per animal unit may be larger than in 1940. In the drought areas of the South and East, the supply of feed available per animal may be less but efforts are being made by War Food Administration to move feed into the area in order to maintain livestock production.

Prospects for corn production have shown further improvement during September, and the October 1 crop report indicates a total corn crop of over 3 billion bushels. This is the third largest crop on record and only 119 million bushels below the record of 1942. Prospects for oats have also improved and on October 1, the crop was indicated at 1,149 million bushels, 13 percent above the 1932-41 average, but 15 percent below 1942. Prospects for barley, on the other hand, have declined somewhat and the crop is now estimated at 330 million bushels, 36 percent above the 1932-41 average, but 23 percent below 1942.

Prospects for 1944-45

The acreage suggested by the War Food Administration for 1944 planting of corn, oats, and barley is about equal to the 1943 total for these feed grains, with a 3 percent increase recommended for corn and decreases for oats and barley. With only average yields, the production of these grains would be 3 percent less than in 1943. This decrease would be more than compensated for by increased production of legume hay crops. Particularly large increases in acreage of soybeans and peanuts have been recommended, with a view to increasing the production of oilcake and oilmeal -- high-protein feeds. In order to balance livestock numbers with the expected feed production for 1944, the War Food Administration has also suggested that the number of sows farrowed in 1944 be about the same as the number farrowed in 1942, or about 20 percent less than in 1943. Pasture and range conditions will be an important factor in the feed supply situation beginning in the spring of 1944.

Table 3.- Production of major food commodities, calendar years, 1935-39 average, 1940, 1941, 1942, and 1943 (preliminary), with percentage comparisons

Commodity	Unit	1935-39	1940	1941	1942	1943	1943 as a percentage of 1935-39	1943 as a percentage of 1942
Meats (dressed weight)								
Beef and veal	Mil. lb.	7,974	8,160	9,121	9,782	10,103	127	103
Lamb and mutton	"	871	877	925	1,036	987	113	95
Pork (excluding lard)	"	7,337	9,958	9,447	10,642	13,082	178	123
Total meats	"	16,182	18,995	19,493	21,460	24,172	149	113
Fish								
Fresh and frozen (dressed) 1/	"	730	768	879	771	633	87	82
Canned fish 1/	"	699	674	726	647	692	99	107
Cured fish	"	82	74	73	70	63	77	90
Poultry products								
Chickens (dressed weight)	"	2,325	2,424	2,641	2,990	3,800	163	127
Turkeys (dressed weight)	"	350	482	467	497	480	137	97
Eggs	Mil. doz.	3,335	3,629	3,828	4,420	5,000	150	113
Dairy products 2/								
Total milk 3/	Mil. lb.	103,656	109,341	115,196	118,776	117,861	114	99
All cheese 4/	"	669	782	951	1,109	914	137	82
Condensed and evaporated milk	"	2,224	2,731	3,555	3,782	3,174	143	84
Ice cream	"	1,232	1,495	1,834	2,160	1,740	141	81
Fluid milk and cream 5/	"	44,147	45,591	46,900	49,433	52,943	120	107
Dried skim milk 3/	"	243	322	366	565	450	185	80
Fats and oils								
Butter, farm and factory	"	2,170	2,240	2,268	2,118	2,138	99	101
Lard 6/	"	1,620	2,313	2,213	2,371	2,800	173	118
Compounds and vegetable cooking fats (fat content)	"	1,539	1,196	1,418	1,285	1,365	89	106
Margarine (fat content)	"	303	257	297	347	514	170	148
Other food products and uses (fat content) 7/	"	573	900	1,010	1,148	1,200	209	105
Total fats and oils	"	6,205	6,906	7,206	7,269	8,017	129	110

Continued -

Table 3.- Production of major food commodities, calendar years, 1935-39 average, 1940, 1941, 1942, and 1943 (preliminary), with percentage comparisons - Continued

Commodity	Unit	1935-39	1940	1941	1942	1943	1943 as a percentage of 1935-39	1943 as a percentage of 1942
Fruits								
Fresh								
Citrus 8/	Mil. lb.	6,870	7,908	8,112	7,926	8,410	122	106
Apples 9/	"	6,021	5,429	4,270	4,288	2,900	9/	68
Other (excluding melons) 10/	"	4,807	5,001	5,349	5,098	3,818	79	75
Processed								
Canned fruits 11/	"	1,666	1,695	2,298	2,273	1,759	106	77
Canned juices 12/	"	459	794	939	856	1,322	288	154
Dried fruits 13/	"	1,127	823	904	1,014	1,132	100	112
Frozen fruits 14/	"	106	172	202	229	180	170	79
Vegetables								
Fresh 15/	"	30,450	31,714	32,102	33,538	29,794	98	89
Canned 16/	"	4,115	4,734	5,874	6,860	6,712	163	98
Potatoes	1,000 bu.	357,551	374,582	357,471	377,212	470,935	132	125
Sweetpotatoes	"	67,927	52,243	62,144	65,380	74,704	110	114
Dry edible beans	1,000 100 lb. bags (cleaned basis)	13,606	15,732	17,047	18,139	21,176	156	117
Sugar (raw basis)	1,000 short tons	1,994	2,229	2,090	2,150	1,736	87	81
Grains								
Wheat	Mil. bu.	759	813	943	981	836	110	85
Rye	"	45	40	45	57	33	73	58
Rice	"	50	54	51	66	69	138	105
Corn	"	2,316	2,462	2,676	3,175	3,056	132	96
Oats	"	1,045	1,245	1,181	1,359	1,149	110	85
Barley	"	239	309	362	426	330	138	77

Continued -

Table 3.- Production of major food commodities, calendar years, 1935-39 average, 1940, 1941, 1942, and 1943 (preliminary), with percentage comparisons - Continued

1/ Including shellfish. 2/ Calculated on fat solids equivalent. 3/ For human consumption. 4/ Excluding cottage, pot, and bakers' cheese. 5/ Fluid milk equivalent for fresh use. 6/ Excluding amount used in manufactured products. 7/ Represents fats used in cooking and salad oils, salad dressing, mayonnaise, in bakery products, and other minor uses such as fish canning. 8/ Harvesting usually begins in November of the preceding year. 9/ 1935-39 and 1940 production includes estimated noncommercial production, which is excluded in succeeding years. Percentage comparison between 1943 and 1935-39 is omitted since estimates are not comparable. 10/ Includes apricots, avocados, bananas, cherries (including noncommercial), cranberries, figs, grapes, peaches, pears, pineapples, plums and prunes (including noncommercial), and strawberries (including noncommercial). 11/ Includes apples and applesauce, apricots, berries, cherries (including brined), cranberries, figs, fruit cocktail, fruits for salad, grapefruit segments, olives, pineapples, plums and prunes, peaches, and pears. 12/ Includes grape, grapefruit, lemon, orange, pineapple, and miscellaneous. 13/ Includes apples, apricots, currants, dates, figs, peaches, pears, prunes, and raisins. 14/ Principally cherries, strawberries, and other berries. 15/ Commercial production, market gardens, and farm production for home use. Vegetables included, commercial: Artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloups, carrots, cauliflower, celery, corn, cucumbers, eggplant, escarole, kale, lettuce, onions, peas, peppers, shallots, spinach, tomatoes, watermelons. Other: Anise, broccoli, brussels sprouts, chard, chicory, collards, cowpeas, cress (water), dandelions, dill, endive, fennel, garlic, greens (unspecified), horsebeans (green), horse radish, kohlrabi, mustard greens, okra, parsley, parsnips, pumpkin, radishes, rhubarb, romaine, rutabagas, rutabaga greens, salsify, sorrel, squash, turnips, turnip greens, mixed vegetables, Chinese cabbage, other vegetables. 16/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, peas, pimientos, pumpkin and squash, spinach, tomatoes, tomato pulp, and tomato juice, cabbage (kraut), tomato sauce, paste, and catsup, vegetable puree (including baby foods), mixed vegetables, and other vegetables and vegetable juices. Also bulk kraut and bulk pickles on a canned basis.

RETAIL FOOD PRICES, JANUARY-AUGUST 1943

The cost of living has shown a gradual increase since January 1941, with a slight decline in recent months, whereas retail prices of all foods combined have risen more sharply, with a more pronounced downward turn beginning with June 1943. (See cover chart.) The recent decrease in both cost of living and food prices is due in part to the roll-back on maximum prices of meats, butter, and certain fresh vegetables.

Prices of all food groups increased from 1941 to 1942 and from 1942 to 1943, the degree of change varying among the groups, as indicated in the following table:

Increase in cost of living and retail food prices, United States, first 8 months of 1941. 1942, and 1943

Item	Percentage increase		
	1941 to 1942	1942 to 1943	1941 to 1943
Cost of living	12	7	20
All foods	18	14	35
Meats	17	10	29
Eggs	24	22	52
Dairy products	14	10	25
Fats and oils	34	7	44
Cereals and bakery products	9	3	12
Fruits and vegetables	25	35	68
Fresh	25	40	75
Canned	27	9	38
Dried	27	21	53
Sugar and sweets	22	1	23
Beverages	26	3	29

Table 4.- Index numbers of retail food prices and total cost of living, United States, by months, 1941-43

(1935-39 = 100)

Year and month	Meats	Eggs	Dairy products	Fats and oils	Cereals and bakery products	Fruits and vegetables			Sugar and sweets	Beverages	All foods	Total cost of living
						Fresh	Canned 1/	Dried				
1941	108	112	112	94	98	104	98	107	106	102	105	105
Jan.	101	97	105	80	95	93	91	100	95	91	98	101
Feb.	102	85	104	81	95	96	92	100	96	92	98	101
Mar.	102	83	105	81	95	98	92	99	98	94	98	101
Apr.	104	92	106	85	95	102	93	100	105	95	101	102
May	104	94	108	88	95	106	94	103	107	96	102	103
June	107	104	110	92	96	116	96	105	107	99	106	105
July	109	115	112	97	96	109	98	106	108	101	107	105
Aug.	111	121	114	99	99	104	100	109	109	104	108	106
Sept.	116	133	118	103	101	99	102	111	112	109	111	108
Oct.	113	137	120	106	102	104	104	113	112	111	112	109
Nov.	110	146	121	107	102	111	105	116	113	113	113	110
Dec.	111	138	120	108	102	111	106	118	114	114	113	110
1942	126	136	125	120	105	133	122	136	127	122	124	116
Jan.	116	131	122	111	103	119	109	122	118	116	116	112
Feb.	118	119	122	114	104	118	115	125	128	117	117	113
Mar.	120	112	122	117	105	124	121	128	128	120	119	114
Apr.	122	111	122	120	105	126	122	131	128	123	120	115
May	124	115	123	122	105	130	123	131	127	125	122	116
June	127	120	122	120	105	137	122	133	127	123	123	116
July	128	130	123	120	105	139	122	134	127	123	125	117
Aug.	130	146	126	120	105	135	123	139	127	124	126	118
Sept.	131	155	128	121	105	130	124	143	127	124	127	118
Oct.	131	165	131	121	106	139	125	150	127	124	130	119
Nov.	132	166	132	124	106	145	127	150	127	125	131	120
Dec.	133	167	132	125	106	151	128	150	128	124	133	120
1943												
Jan.	135	166	134	126	106	147	129	154	127	124	133	121
Feb.	136	144	136	126	106	153	131	156	127	125	134	121
Mar.	137	142	137	126	107	173	132	157	128	125	137	123
Apr.	138	141	137	127	108	191	132	158	128	125	141	124
May	138	142	137	126	108	206	131	158	128	124	143	125
June	138	146	134	126	108	202	130	158	126	124	142	125
July	131	154	133	126	108	193	130	159	126	124	139	124
Aug. 2/	130	167	133	126	108	179	130	160	127	125	137	123

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Buream of Agricultural Economics.

1/ Canned weight.

2/ Preliminary.

RETAIL PRICE CEILINGS ON FOODS, ISSUED SEPTEMBER 13-OCTOBER 11, 1943

Date issued	Food	Price ceiling
9-15-43	Fresh fish and seafood	Eight additional varieties placed under price control. Effective 9-21-43. (MPR 439, Am. 3)
9-15-43	Fresh shrimp	Specific prices at fisherman's level, resulting in a probable reduction of 40 to 50 percent in price paid by consumer. Effective 9-21-43. (MPR 418, Am. 8)
9-18-43	Variety meats	Specific maximum prices established for boneless cured brisket, deckle off. Sliced dried beef removed from MPR 336 and placed under MPR 355. Effective 9-8-43; 9-20-43. (MPR 355, Am. 11)
9-20-43	Salt fish	Revised maximum prices on codfish, hake, haddock, cusk, and pollock, resulting (with one or two exceptions) in increase of 1/2 to 1 cent per pound in price paid by consumer. Effective 9-21-43. (RMPR 384)
9-21-43	Grapes, for processing	Maximum prices established for Concord grapes at grower level, resulting in increase in price paid by consumer. Effective 9-24-43. (MPR 425, Am. 2)
9-23-43	Hearth bread, specified areas	Permitted increase in price according to increased size of loaf over Mar. 1942 level. Effective 9-29-43. (RSR 14, Am. 31)
9-24-43	Cracker meal	Alternative pricing method for containers of 5 pounds or more: 7.35 cents per pound in California, Oregon, and Washington; 6.55 cents, other states and District of Columbia. Effective 9-30-43. (RSR 14, Am. 32)
9-24-43	Fruit preserves, jams, and jellies	Method established for calculating maximum prices of 1943 pack for sales by packers, wagon wholesalers, and distributors other than wholesalers and retailers. Increase at consumer level through mark-up, averaging 3 to 4 cents on 1-pound jars. Effective 9-30-43. (MPR 473)
9-28-43	Vegetable powders for making beverages	Removed from mark-ups at wholesale and retail and returned to GMPR. Effective 10-4-43. (MPR 421, Am. 3; MPR 422, Am. 5; MPR 423, Am. 6)

Date issued	Food	Price ceiling
9-28-43	Poultry	Revisions in maximum prices for sales by processors, wholesalers, and hotel supply houses, effecting reductions at retail of 3-1/2 cents per pound for quick-frozen eviscerated, and 1 cent for drawn and dressed poultry. Effective 10-12-43. (RMPR 269, Am. 14, 15)
9-29-43	Potatoes, late 1943 crop	Specific maximum prices established at country shipper level for Oct. 1943-June 1944. Retail ceilings will be approximately 4.5 cents per lb. in October 1943 to 5.5 cents in June 1944. Effective 10-1-43. (RMPR 271, Am. 7)
9-29-43	Canned Cuban pineapple and pineapple juice	Wholesalers placed under mark-up regulation (MPR 237) until 12-1-43 and retailers (MPR 238) until 1-31-44. Effective 10-5-43. (MPR 197, Am. 4)
9-29-43	Bakery products	Retailers who buy in bulk and sell wrapped or packaged may add cost of such materials. Effective 10-5-43. (MPR 319, Am. 6)
9-30-43	Edible tree nuts, shelled and in shell	Price ceilings to be established at all levels from grower to consumer. (OPA-3242)
10-2-43	Peanut butter	Program announced that will effect reduction in consumer prices from July level of 33.1 cents to about 26.5 cents per pound. (USDA 423-44)
10-4-43	Canned fruit cocktail and mixed fruits	Maximum prices revised at canner level on fruit cocktail, resulting in increased cost to consumer, and maximum prices established for mixed fruits. Effective 10-9-43. (MPR 306, Am. 17)
10-4-43	Dried fruits, 1943 and later crops	Specific maximum prices for sales by processors and primary distributors. Consumer prices for figs and a few specialty items will be raised. Effective 10-9-43. (MPR 475)
10-4-43	Milk	Limited conditions under which national and regional offices of O.P.A. can raise ceilings in cases of local shortages. Effective 10-4-43. (GMPR, Am. 59; SR 14A, Am. 5; SR 15, Am. 12; MPR 280, Am. 35; MPR 329, Am. 14)

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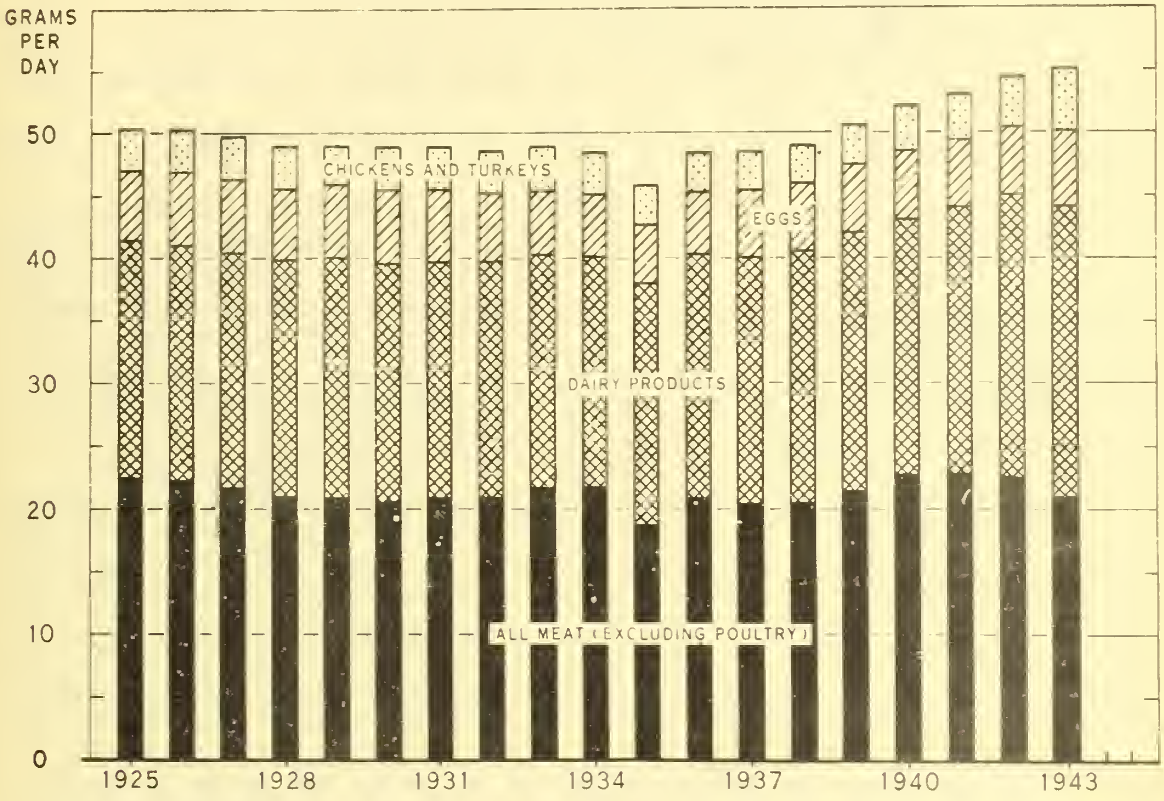
THE National Food SITUATION

CURRENT SERIAL RECORD
DEC 14 1943
U.S. DEPARTMENT OF AGRICULTURE

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-11 BAE NOVEMBER 1943

DAILY CIVILIAN CONSUMPTION PER CAPITA OF ANIMAL PROTEIN, UNITED STATES, 1925-43



U. S. DEPARTMENT OF AGRICULTURE NEG 43386 BUREAU OF AGRICULTURAL ECONOMICS

Despite wartime restrictions on civilian food supplies, the civilian consumption per capita of animal protein in 1943 will be higher than in any other year during 1925-43. The relatively smaller amounts of protein from meat animals will be more than offset by a record consumption of poultry, eggs, and fluid milk. In the 19-year period under consideration, meats supplied, on the average, 44 percent of the total animal protein consumed per person, dairy products 38 percent, chickens and turkeys 7 percent, and eggs 11 percent.

THE NATIONAL FOOD SITUATION

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Summary

Production of food crops, as indicated in the November crop report, remained substantially the same as was estimated a month earlier. Total food output in 1943 still shows a 32 percent increase over the average in 1935-39 and a 5 percent increase over 1942.

Meat production is reaching a seasonal peak. A large proportion of the increases will be taken for military and lend-lease requirements. Civilians also will be able to purchase a larger amount of meat as a result of the recent lowering of the point values of many cuts of meat. A record quantity of chickens and eggs will be available for civilian consumption during the coming holidays, but supplies of turkeys will be somewhat less than a year ago. The total output of milk, as well as the production of manufactured dairy products (with the exception of evaporated milk and dried whole milk), declined more than seasonally. However, with feed payments to dairy farmers now in effect, the downward trend in milk production probably will be checked, at least for the balance of the year.

In a series of recent State meetings, State farm leaders set a goal for food production in 1944 which, if fully realized, would result in a total food output 38 to 40 percent above the pre-war average and 4 to 6 percent above the record output in 1943 provided yields are about average.

The goal calls for a total of 380 million acres to be planted in 1944 compared with 364 million acres planted in 1943. Most of the increase will be devoted to food crops. With average yields, total food crop production under the acreage goal would be about 18 percent above the average in 1935-39 and about 4 percent above 1943.

The goals recommend some increases in total milk and egg output, a slight decrease in chickens and turkeys raised, and a sufficient volume of livestock slaughter to reduce the number of meat animals on farms from the record high point reached in 1943. Altogether the suggested or indicated slaughter of meat animals during the year would result in an 8 to 10 percent increase in total meat production in 1944. The combined output of poultry, dairy, and meat products under the goals would be 4 to 6 percent larger than the all-time high reached this year and over 40 percent above the average in 1935-39.

Achievement of the 1944 goals for agricultural production will depend upon adequate machinery, fertilizer, and labor, as well as price supports. In the case of livestock, it will also be necessary to provide the deficit feed areas witn sufficient supplies of feed.

-- November 20, 1943

COMMODITY REVIEWS

Meat

Meat production is approaching the seasonal peak and in October federally inspected slaughter was about 10 percent above the same month last year. Some of the increases in production will go to civilians. The Office of Price Administration lowered the point values of practically all veal, lamb, mutton, as well as pork shoulders and loins, by 10 to 20 percent for the period November 1 to December 5. On November 19 a further reduction of 2 points per pound was made on all pork products for a limited period. Point values on hamburger, however, were raised. A large proportion of the increased beef production will go to the armed forces. Under recent regulations, the amount of beef set aside for the armed forces was raised from 45 to 50 percent, and the specifications were lowered to include Utility beef. The Food Distribution Administration will probably increase its purchases of meats (mainly pork) since purchases in recent months have been quite small and much below current needs. Some of the meat may be stockpiled to meet war requirements next summer. FDA has urged the meat industry to build up reserves during the peak production season and exempts any such reserves from inventory controls prior to July 1, 1944.

The 1944 goals for livestock call for some reduction in the number of animals on farms (other than milk cows) from the high point reached this year. If the livestock goals are fully realized, the production of meat next year may exceed this year's production (now indicated at 24 billion pounds) by as much as 10 percent. An increase in slaughter of cattle and calves would be necessary in order to reduce the number of animals on farms to the level set by the goals. The number of sows recommended for farrowing this year is one and a half times as large as it was in 1935-39, but only about 83 percent as large as the number farrowed in 1943. Production of pork will depend to a great extent on the weights to which the animals are fed. The average weight of hogs slaughtered under federal inspection this year will probably be about 250 pounds, but, because of limited feed supplies in prospect, it is expected that the average weight next year will approximate the "normal" average, or about 230 pounds. Production of beef and veal is also dependent on the live weights of cattle and calves slaughtered, but to a lesser degree, and even though slaughter reaches the level implied by the goals (over 20 percent above 1943) it seems probable that the production of beef and veal will not increase in the same proportion.

Poultry and Eggs

A record quantity of chicken will be available for civilian consumption during the coming holidays. Supplies of turkey, on the other hand, will be somewhat less than a year ago resulting from a smaller slaughter than last fall and an increased amount taken for the military forces. For 1943 as a whole consumption per capita of both chicken and turkey will be nearly 33 pounds compared with less than 26 pounds in 1942.

Marketings of both chickens and turkeys are seasonally heavy in the last quarter of the year.

Even at the record high supply levels, however, the unprecedented consumer demand for poultry at ceiling prices probably will not be fully satisfied in some sections of the country. In recent weeks, under pressure of seasonally heavy farm marketings of chickens and old hens and shortages of storage space, prices of live birds generally have been somewhat below the maximum levels permitted by OPA regulations. Practically all quotations on dressed poultry, however, have been firm at ceilings. The Bureau of Labor Statistics reported that in mid-September the average retail price per pound for roasting chickens in 51 cities of the United States was 44.5 cents compared with 42.5 cents a year earlier.

Supplies of eggs for civilians in the last 3 months of 1943 are the largest on record for the same period in other years and about 20 percent larger than the 1935-39 average. The decline in consumption in 1943, from the spring peak to the fall low, has been unusually small. The record quantity of eggs for civilians this fall results from record egg production on farms and larger storage supplies. Supplies of storage eggs for civilians were increased slightly over earlier expectations through the War Food Administration's withdrawal of FDO 40 which had restricted the storage of shell eggs largely to governmental uses. Total production of eggs in the 3 months, November through January 1942-43, was about 63 percent above the same period in 1935-39. Should the weather be favorable in the corresponding months of 1943-44, total egg output will reach an even higher level.

Demand for top grade eggs has continued to exceed supplies at ceiling prices, reflecting the record purchasing power and apparent quality preference. Supplies of lower grades, on the other hand, have been more than ample to meet demand at top permissable levels. The 51-city average retail price of eggs in mid-September as reported by the Bureau of Labor Statistics was 62.7 cents per dozen compared with 55.2 cents in September last year.

The 1944 goals for poultry products call for an output as large as the record in 1943. Present estimates indicate that total production of chicken in 1943 will be approximately 3.8 billion pounds (dressed weight) compared with about 3 billion pounds in 1942. Egg production in 1943 is expected to be nearly 5 billion dozen compared with about 4.4 billion dozen in 1942.

Dairy Products

Limitations on sales of fluid milk, fluid cream, and milk by-products were in effect in 82 major market areas by or on November 1. Each dealer is allowed a quota amounting to 100 percent of his June sales of fluid milk, and 75 percent of June sales of fluid cream and milk by-products. Each group of products has a specific quota, but dealers may apply to the market agents for a change in one quota by making compensatory changes in the others. The amount of fluid milk available to consumers in areas affected by the order will be about 20 percent greater than consumption in 1942, since the consumption of fluid milk in June was at a high level. Supplies of buttermilk, chocolate milk, and cottage cheese will be lower than in 1942 but 30 percent greater than the 1935-39 average.

Cream consumption has been curtailed by an order of the Food Distribution Administration limiting the butterfat content of cream; and the limitation on the volume of fluid cream sales will effect a further reduction, amounting to about 22.5 percent of the expected 1943 consumption. The milk and butterfat saved by these limitations will go into manufactured dairy products. It is estimated that about half of these savings will be utilized in the production of butter and is expected to add about 5 percent to the total butter supply. The remainder of the milk will be used in the production of evaporated milk, whole milk cheese, and condensed and dried whole milk.

Total milk production on farms in October was 2 percent below that of a year ago. Fluid milk supplies have been at a low level, and dealers in some markets have had difficulty in getting enough milk to meet the fluid milk quotas allowed under the limitation order. The output of manufactured dairy products in September with the exception of evaporated milk and dried whole milk, was also below last year and declined more than seasonally.

Dairy farmers began to receive their October feed payments early in November. The payments range from 30 to 50 cents per hundredweight of milk, averaging about 36.5 cents. For butterfat sold as farm-separated cream, the payments range from 4 to 6 cents per pound, averaging 4.25 cents. The payments are intended to compensate for extra cost of feed and prevent a rise in price of milk to consumers.

With the feed-payments program now in effect it is probable that the downward trend in milk production, relative to last year, will be halted, at least for the balance of this year. The feed situation will become tighter after the first of next year as locally grown crops are used up in deficit feed areas. The 1944 goal calls for a total milk production of 121 billion pounds, 2 percent above the production in 1943. Cow numbers on farms on January 1, 1944, will be large enough to permit the realization of this goal. However, the level of milk production to prevail in 1944 will depend to a considerable extent on the quantity of feed concentrates made available to dairy producers from surplus feed areas.

Livestock, poultry, and dairy product goals for 1944

Item	Unit	1943 expected	1944 goal	Goal as percentage of 1943
Hogs: Number of sows to farrow:				
In spring	1,000 head	12,140	10,325	85
In fall	" "	8,515	6,898	81
Cattle and calves: Total number, Dec. 31	" "	80,800	76,842	95
Beef cows, Dec. 31	" "	12,466	11,970	96
Sheep and lambs: Number on farms, Dec. 31	" "	52,900	51,901	98
Milk: Production on farms	Mil. lb.	118,302	121,237	102
Milk cows: Number on farms	1,000 head	25,669	26,148	102
Eggs: Production on farms	Mil. doz.	4,516	4,597	102
Chickens: Production on farms	Thous.	925,652	892,983	96
Chicken broilers: Commercial production	"	248,576	208,805	84
Turkeys: Production on farms	"	33,176	32,079	97

Fats and Oils

Total supplies of fats and oils in the 12 months beginning October 1943 may be about 1 billion pounds greater than a year earlier. Lard output this season may increase about 450 million pounds, and soybean and linseed oil production will increase substantially. An increase in imports also is expected.

The supply of food fats for civilian consumption, however, probably will not rise from the present level, under rationing, of approximately 44 pounds per capita annually. A large part of the increase in lard production is expected to be required for soap. Supplies of inedible tallow and greases, and imported coconut and palm oils, the principal fats normally used in soap, are not sufficient to meet soap makers' needs at the present restricted rate of soap production. Increases in supplies of fats and oils other than lard will be used to meet increased military and lend-lease requirements and to rebuild stocks to normal working levels.

Apparent civilian consumption of butter and margarine in 1943 may total about 17 pounds, compared with approximately 18.5 pounds in 1942 and an average of 19.7 pounds annually in 1935-39. A slight reduction appears likely in 1944, assuming continuation of present quotas for margarine manufacture.

Civilian butter consumption apparently was slightly lower in the third quarter of 1943 (July-September) than in the preceding 3-month period, largely as a result of a seasonal decline in production and continued accumulation of stocks by Government agencies to meet lend-lease and military requirements in the fall and winter months. Government purchases of butter were discontinued on October 1, however, and it was announced that they would not be resumed until April 1944. Total civilian consumption of butter in 1943 may be slightly over 13 pounds per capita compared with 15.7 pounds in 1942 and an average of 16.8 pounds in 1935-39. In 1944, butter production may decline about 5 percent, but United States military requirements will continue large. It is expected that butter shipments to the Russian Army in 1944 will be relatively small or about the same as this year's shipments. The supply for civilians probably will be smaller in 1944 than in 1943.

After rationing of food fats began in late March 1943, production and consumption of margarine for civilian use was materially less than the maximum permitted under a Government order limiting manufacturers' use of fats and oils. During the third quarter (July-September), however, with butter short in retail stores in many areas of the country, particularly in the Eastern States, consumption of margarine increased rapidly and in September approached manufacturers' maximum permissible output. In October-December, manufacturers may produce for civilian consumption a maximum of 167 percent of the average quantity produced in the fourth quarters of 1940 and 1941. This would permit an increase of about 40 percent over the third-quarter level of production and consumption. Should this increase be achieved, civilian consumption in 1943 would average about 4.1 pounds per capita (3.3 pounds per capita in terms of fat content), compared with 2.8 pounds in 1942 and an average of 2.9 pounds in 1935-39. Under present quotas, manufacturers could produce a maximum of about 4.9 pounds of margarine per capita for civilian consumption in 1944.

Fruits

Oranges, grapefruit, lemons, apples, winter pears, grapes and cranberries comprise the principal fresh fruits moving to market during November and December. All of these fruits were moving in substantial volume during early November.

Per capita civilian supplies of fruits in general are smaller this season than last. Supplies of apples, winter pears, cranberries, and canned fruits are considerably smaller, and those of grapes, oranges, grapefruit, and dried fruits are about as large. Total per capita supplies of canned fruits and fruit juices for civilians in 1943-44 probably will not exceed three-fourths the quantity consumed in 1942-43. The civilian per capita supply of dried fruits, mostly raisins and prunes, during the marketing year 1943-44 is expected to be about as large as the quantity consumed in 1942-43, or slightly larger.

The 1943-44 orange and tangerine crops, exclusive of Valencia oranges in California, are estimated at 64.2 million boxes or about 8 percent larger than last season. The 1943-44 grapefruit crop, exclusive of the California summer production for 1944, is estimated to be 46.7 million boxes -- almost as large as the record crop of the past season. The commercial apple crop is estimated to be 88.1 million bushels -- 31 percent below that of last year. Production of pears other than the Bartlett variety in the three Pacific Coast States, the main source of winter pears, is estimated at

4 million bushels or 20 percent less than last year. In contrast, the grape crop this year is of record size, 2,789,700 tons, 16 percent larger than last year. The cranberry crop of 691,400 barrels, although 15 percent smaller than last year, is 13 percent above average. Total production of all fruit this season is expected to be 9 percent smaller than last season, although slightly above average.

The 1943 canned pack of deciduous fruits may be about three-fourths as large as the near-record pack last year. But the 1943 pack of dried fruits may exceed the 1942 pack by 12 to 15 percent.

Vegetables

Frosts in the Northeastern and Midwestern truck crop producing areas have terminated the growing season for all except the hardier truck crops. Supplies of tender crops and a larger share of all truck crops, therefore, will come from the Far West and South during the next few months. Shipments of carrots, spinach, and lettuce are expected to continue, during the next few weeks, in heavy volume; and shipments of snap beans, beets, cabbage, cauliflower, celery, and onions in moderate volume. November and early December supplies this year of most truck crops for fresh shipment are expected to be as large as or larger than supplies last year. Lettuce, spinach, and carrots are likely to be in substantially larger supply than a year ago.

The "fall" acreage of 11 fresh market truck crops (crops marketed during the next 2 to 3 months) is indicated to be about one-third larger this year than last. Increases in acreage are largest for carrots, snap beans, and celery. Reported "winter" and "spring" planted acreages or intended acreages of 9 commercial truck crops for fresh shipment exceed last year's by 16 percent. Thus, substantially larger supplies of fresh vegetables appear in prospect for the next few months than were available during the same period a year ago.

Supplies of processed vegetables are expected to be considerably smaller in 1943-44 than last season. The aggregate tonnage of truck crops for processing is indicated to be about 10 percent smaller than in 1942 but more than one and one-half times as large as the 10-year (1932-41) average. The snap bean and beet processing crops are estimated to be 3 percent and 4 percent larger, respectively, this year than a year ago. Other major processing crops are estimated to be smaller than last season by the following percentages: Green peas, 4 percent; sweet corn, 6 percent; green lima beans, 15 percent; tomatoes, 12 percent; cabbage for kraut, 18 percent; and cucumbers for pickles, 27 percent. Carry-in commercial stocks of processed vegetables this year also were at an extremely low level. Noncivilian requirements are large, with approximately 30 percent of the 1943 canned vegetable pack reserved for Government purchase. Consequently civilian supplies of canned vegetables during the next few months are expected to continue substantially below those of a year earlier. For the 1943-44 season as a whole, the per capita supply may be only about three-fourths to four-fifths as large as in 1942-43.

Potatoes

The supply of white potatoes produced for sale was about one and one-half times as large on November 1 as a year earlier. Supplies should be adequate for all purposes, notwithstanding unusually large requirements. Per capita civilian supplies for 1943-44 are indicated to be about 14 percent larger than for 1942-43.

The supply of sweetpotatoes, also, should be more plentiful this year than last. This year's crop of 76 million bushels is 16 percent larger than last year's crop.

Acreage goals for 1944

Item	1943 indicated	1944 goal	Goal as percentage of 1943
	1,000 acres	1,000 acres	Percent
Corn, planted	96,818	100,253	104
Oats, planted	42,654	39,558	93
Barley, planted	17,893	17,372	97
Sorghums (except sirup), planted	17,220	16,740	97
Hay, all tame, harvested	60,489	62,838	104
Wheat, planted	54,159	67,030	124
Rye, acreage for harvest as grain	2,875	2,408	84
Rice, planted	1,538	1,525	99
Soybeans, harvested for beans	11,480	13,654	119
Flaxseed, planted	6,289	5,895	94
Peanuts, grown alone	5,013	6,158	123
Sugar beets, planted	636	951	150
Sugar cane, for sugar and seed	331	333	105
Irish potatoes, planted	3,444	3,519	102
Sweetpotatoes, planted	923	1,056	114
Fresh vegetables, 23 crops	1,524	1,688	111
Processing vegetables, 11 crops	2,106	2,210	105
Dry beans, planted	2,807	3,048	109
Dry peas, planted	741	895	121

CONSUMPTION OF GRAIN PRODUCTS IN THE UNITED STATES, 1935-43

Few changes in the volume or pattern of consumption of grain products have developed during the past 9 years. The per capita consumption of corn meal and white flour, representing about 85 percent of the total, has remained almost constant. Cereal products and other kinds of flour have shown a slight upward trend, but are relatively small compared to the total. The most significant increases have come in the consumption of corn sirup and sugar, which totaled about 11 pounds during the period 1935-39, 20 pounds in 1942, and will probably total about 17 pounds in 1943. Corn sirup and sugar are used extensively in manufactured products such as baked goods and candy, and are easily substituted for cane or beet sugar, supplies of which are restricted under present rationing orders. In recent years, corn sugar has been refined to a higher degree than it was in the past, in order to facilitate its substitution for cane and beet sugar.

Although the total per capita consumption of corn meal has not shown much variation, there has been some shift in types of corn meal consumed. During 1935-39, the quantity of corn meal produced for farm home consumption amounted to more than half of the total, and merchant mill production accounted for the remainder. Assuming that the merchant mill product is used principally by the nonfarm population, it appears that the per capita consumption on farms averaged about four times the per capita consumption for the nonfarm population during this period. During the past 2 years, merchant mill production has increased to about three-fifths of the total, and the quantity produced for farm home consumption has shown a corresponding decline.

Corn starch is used principally for malt beverages, laundry starch, and other industrial products. It is estimated that during 1935-39 only about one-fourth of the total production was used in food products. Although total production of corn starch has nearly doubled compared to the 1935-39 average, the demand for the product for industrial uses in the last 2 years has been so great that less than one-fifth of the total was used for food.

The per capita consumption of white flour has remained fairly constant in recent years. However, there has been an upward trend in the consumption of semolina, a type of white flour used principally for spaghetti, macaroni, and similar products. The per capita consumption of semolina averaged about 4.5 pounds in 1935-39, increased to 6.4 in 1942, and may exceed 7.5 in 1943, nearly offsetting the slight decline in the civilian supply of other white flour.

From data given in the Biennial Census of Manufactures, it is estimated that during 1935-39, approximately one-third of the total consumption of white flour was utilized by the commercial baking industry. Most of this flour was made into bread. Recent reports on retail sales indicate that at present a larger proportion of the civilian supply of flour is used by the baking industry. Such a development is consistent with the rationing of food fats and sugar, which tends to reduce the volume of home baking.

Since fats and sugar supplied to bakeries are also subject to ration restrictions, it is possible that the production of sweet goods and pastries will not increase as much as the commercial production of bread.

While the production of whole-wheat flour has shown an increase in recent years, it is still a relatively small part (about 2 percent) of total wheat-flour production.

The annual per capita consumption of rice varies from 5 to 7 pounds. While total rice production has shown an upward trend in recent years, about one-third to one-half of our production is usually shipped to the territories, and at present additional quantities are used for shipments to our Allies.

It has been suggested that an increase in the consumption of grain products be encouraged in order to offset shortages of other food products. Many of the essential nutrients are found in grain products. For instance, enriched white bread contains more vitamin B and more calories per pound than any cut of beef, rolled oats contains more phosphorus and iron per pound than any kind of meat except liver, whole wheat flour contains more niacin per pound than poultry or lamb, and approximately two-thirds as much as the average in other meats except liver. Obviously, grain products could provide many of the necessary vitamins and minerals much more cheaply than they can be obtained from animal products, and the caloric content of grain products is very high. However, when incomes are high, consumer demand shifts away from the less expensive grain products to the more expensive animal products. Since during periods of high income it is more profitable for the producer to convert grains to animal products and more satisfying to the consumer regardless of the cost, a shift to more economical diets is difficult to accomplish.

Corn, oats, and barley are chiefly used for feeding livestock. This year the quantity of wheat used as feed will amount to approximately half as much as our total production. Even though some quantities of feedstuffs are imported from Canada, and stocks are reduced to a minimum, feed disappearance per animal unit in 1943-44 will not exceed the average in 1937-41. In some areas, shortages of feed developed during the past summer, and several corn-processing mills were about to close down until the Government took steps to obtain supplies of grain for them. Since there are already some indications that the feed-grain supplies next year may not be adequate to meet requirements for the desired production of animal products, it seems unlikely that a larger-than-normal quantity of grains will be diverted to the production of grain products for human consumption in the near future. However, supplies of wheat are sufficient to meet all demands for human consumption and the supplies available for feed will be supplemented by imports from Canada.

Estimated per capita consumption of grain products 1/

Commodity	1935	1936	1937	1938	1939	1940	1941	1942	1943
	Pound	Pound	Pound	Pound	Pound	Pound	Pound	Pound	Pound
Corn products									
Corn meal	24.7	24.6	23.7	23.4	23.9	23.8	22.7	22.1	23.6
Corn sirup	6.9	8.5	7.6	7.8	8.1	8.0	8.7	14.5	11.9
Corn starch	1.2	1.4	1.3	1.3	1.4	1.3	1.5	1.5	1.7
Corn sugar	2.8	3.3	3.2	3.1	3.4	3.5	4.8	5.6	4.7
Breakfast food	1.4	1.6	1.8	1.9	1.9	1.9	2.3	2.6	2.4
Hominy	1.0	1.0	1.1	1.4	1.6	1.7	1.5	1.8	1.8
Oats									
Oatmeal	4.2	3.9	3.8	3.8	3.9	3.9	3.9	4.4	4.5
Barley									
Barley food products 2/	1.5	1.4	1.4	1.3	1.2	1.2	1.4	1.6	1.9
Wheat									
White flour	151.5	155.4	151.5	153.0	150.5	150.5	152.3	155.1	152.2
Whole wheat flour	2.4	2.2	2.1	2.7	3.3	3.2	3.1	3.5	3.7
Breakfast food	3.1	3.3	3.4	3.4	3.4	3.4	3.4	3.7	3.7
Rye									
Rye flour	2.1	2.5	2.8	2.1	2.6	3.0	3.3	3.7	3.8
Rice, milled 3/	5.1	6.8	6.6	6.2	6.4	6.1	5.5	6.2	5.9

1/ Civilian consumption beginning 1941. Excludes quantities of grain or products used in malt beverages or for industrial nonfood products.

2/ Principally malt and malt extract in terms of malt equivalent. A small quantity of pearl barley (approximately 1 million pounds annually) was also produced but is negligible on a per capita basis.

3/ Series subject to revision.

THE PRODUCTION AND CONSUMPTION OF POULTRY PRODUCTS IN THE UNITED STATES, 1909-40

The production of poultry products can be expanded fairly rapidly and, consequently, the total output responds more readily to changes in demand than is the case in most other livestock enterprises. The ease with which poultry products can be expanded is seen from our experience in World War II. As a result of large wartime demands, production of chickens has increased from an average of 2.3 billion pounds in 1935-39 to 3 billion pounds in 1942 and is expected to reach nearly 4 billion pounds in 1943. Similarly, egg production increased from 3.3 billion dozens in 1935-39 to 4.4 billion dozens in 1942 and is expected to reach 5 billion dozens in 1943. The response to demand, however, is limited sometimes by other factors -- as was true in the first World War, when a short feed supply prevented the expansion of poultry production despite a strong demand. Further expansion in this war may similarly be limited by the prospective tight feed situation.

United States foreign trade in poultry products from 1909 through 1940 was relatively unimportant and the quantity of poultry and eggs utilized annually in this country prior to 1940 was about equivalent to the amount produced.

Chickens

The per capita consumption of chickens has not shown any marked trend and averaged about 19 pounds per capita during the period 1909 through 1940. The average annual per capita consumption in 1910-14 was 20 pounds while in 1935-39 it was 18 pounds. The decline in the later period was mainly a result of heavy liquidation of chicken numbers following the droughts in 1934 and 1936. The low prices farmers were receiving for chickens and eggs relative to feed costs did not encourage further expansion in chicken numbers during this period. However, in 1942 the civilian consumption of chickens reached an all-time record of 21.9 pounds per capita and is expected to reach about 28 pounds in 1943. In recent years, production of commercial broilers has greatly increased. The average production in 1935-39 was 177 million pounds, by 1942 it had reached 532 million pounds, and in 1943 it is expected to be about 725 million pounds.

Turkeys

Turkey production in the United States has increased considerably since 1929 as a result of the general adoption of improved production methods. Prior to 1929 no separate estimates were made of turkey production. The consumption of turkeys has been increasing steadily. In 1929 the per capita consumption was only 1.7 pounds. In the period 1935-39, however, consumption averaged about 2.7 pounds per capita and by 1942, the civilian consumption had risen to 3.8 pounds.

Eggs

The average annual per capita consumption of eggs (shell egg equivalent) from 1909 through 1940 was about 310 eggs. It ranged from a low of about 280 eggs in 1935 to a high of 342 eggs in 1927. During the period 1910-14, the per capita consumption was about 309 eggs, compared with 300 eggs in the period 1935-39.

Shortage in other protein foods has helped to increase greatly the demand for eggs in recent years; and, in spite of large lend-lease and military requirements, the per capita civilian consumption of eggs in 1943 is expected to reach an all-time high.

Supply and distribution of poultry products, calendar years, 1909-40 1/ - Contd.

Eggs 2/

Year	Supply				Distribution				
	Production	Stocks, Jan. 1	Imports	Total supply	Eggs used for hatching	Exports	Stocks, Dec. 31	Apparent consumption	
								Total	Per capita
	Million dozens	Million dozens	Million dozens	Million dozens	Million dozens	Million dozens	Million dozens	Million dozens	Number of eggs
1909	2,319			2,319	106	5		2,208	292
1910	2,475		3	2,478	116	6		2,356	306
1911	2,695		5	2,700	112	13		2,575	329
1912	2,594		8	2,602	109	19		2,474	311
1913	2,576		11	2,587	112	18		2,457	303
1914	2,557		19	2,576	116	21		2,439	295
1915	2,741		17	2,758	114	22		2,622	313
1916	2,640	45	26	2,711	111	28	30	2,542	299
1917	2,539	30	40	2,609	113	20	52	2,424	281
1918	2,567	52	29	2,648	120	21	30	2,477	284
1919	2,796	30	49	2,875	119	39	63	2,654	303
1920	2,722	63	50	2,835	116	27	35	2,657	299
1921	2,823	35	52	2,910	125	33	43	2,709	299
1922	3,025	43	54	3,122	131	35	59	2,897	315
1923	3,208	59	31	3,298	136	31	85	3,046	326
1924	3,171	85	41	3,297	136	28	50	3,083	324
1925	3,205	50	58	3,313	139	25	79	3,070	318
1926	3,414	79	53	3,546	146	27	61	3,312	338
1927	3,541	61	36	3,638	151	29	66	3,392	342
1928	3,544	66	35	3,645	139	20	89	3,397	338
1929	3,476	89	53	3,618	147	12	66	3,393	334
1930	3,581	66	44	3,691	149	19	125	3,398	331
1931	3,532	125	34	3,691	135	8	109	3,439	333
1932	3,327	109	10	3,446	136	2	50	3,258	313
1933	3,255	50	9	3,314	137	2	72	3,103	297
1934	3,156	72	8	3,236	122	2	72	3,040	289
1935	3,081	72	22	3,175	124	2	85	2,964	280
1936	3,166	85	27	3,278	134	2	61	3,081	289
1937	3,443	61	32	3,536	115	2	112	3,307	308
1938	3,424	112	6	3,542	124	2	59	3,357	310
1939	3,561	59	5	3,625	134	3	74	3,414	313
1940	3,629	74	7	3,710	125	5	77	3,503	319

Contd. -

Supply and distribution of poultry products, calendar years, 1909-40 1/ - Contd.

Chickens (dressed weight) 3/

Year	Supply				Distribution			
	Production	Stocks, Jan. 1	Imports	Total supply	Exports and shipments	Stocks, Dec. 31	Apparent consumption	
							Total	Per capita
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Pounds
1909	1,774			1,774			1,774	19.5
1910	1,904		1	1,905			1,905	20.6
1911	1,955		1	1,956			1,956	20.9
1912	1,896		1	1,897			1,897	19.9
1913	1,885		1	1,886			1,886	19.4
1914	1,907		4	1,911			1,911	19.3
1915	1,928		3	1,931			1,931	19.2
1916	1,878		2	1,880			1,880	18.4
1917	1,857	29	2	1,888		60	1,828	17.7
1918	1,896	60	1	1,957		100	1,857	17.8
1919	1,976	100	2	2,078		82	1,996	19.0
1920	1,932	82	4	2,018		73	1,945	18.2
1921	1,952	73	6	2,031		96	1,935	17.8
1922	2,076	96	4	2,176	6	91	2,079	18.9
1923	2,172	91	3	2,266	6	83	2,177	19.4
1924	2,226	83	4	2,313	5	118	2,190	19.2
1925	2,280	118	5	2,403	6	105	2,292	19.8
1926	2,341	105	8	2,454	4	134	2,316	19.7
1927	2,474	134	6	2,614	5	108	2,501	21.0
1928	2,417	108	7	2,532	4	99	2,429	20.2
1929	2,442	99	7	2,548	3	131	2,414	19.8
1930	2,626	131	2	2,759	3	100	2,656	21.6
1931	2,426	100	1	2,527	3	106	2,418	19.5
1932	2,465	106	1	2,572	1	93	2,478	19.8
1933	2,572	93	---	2,665	2	103	2,560	20.4
1934	2,392	103	1	2,496	2	110	2,384	18.9
1935	2,297	110	1	2,408	2	87	2,319	18.2
1936	2,392	87	2	2,481	1	148	2,332	18.2
1937	2,273	148	5	2,426	2	92	2,332	18.1
1938	2,214	92	2	2,308	2	110	2,196	16.9
1939	2,449	110	1	2,560	3	109	2,448	18.7
1940	2,424	109	2	2,535	2	140	2,393	18.1

Contd.

Supply and distribution of poultry products, calendar years, 1929-40 1/ - Contd.

Turkeys (dressed weight) 4/

Year	Supply				Distribution		
	Production	Stocks, Jan. 1	Imports	Total supply	Stocks, Dec. 31	Apparent consumption	
						Total	Per capita
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Pounds
1929	213	10	---	223	10	213	1.8
1930	216	10	1	227	5	222	1.8
1931	214	5	5	224	10	214	1.7
1932	264	10	1	275	15	260	2.1
1933	298	15	---	313	16	297	2.4
1934	284	16	---	300	19	281	2.2
1935	267	19	---	286	17	269	2.1
1936	361	17	1	379	35	344	2.7
1937	346	35	---	381	26	355	2.8
1938	355	26	---	381	23	358	2.8
1939	422	23	---	445	52	393	3.0
1940	482	52	---	534	60	474	3.6

1/ Data obtained from the April 1942 and March 1943 issues of The Poultry and Egg Situation, Bureau of Agricultural Economics, United States Department of Agriculture.

2/ Total production of eggs consists of the estimated farm output plus 10 percent of such production to allow for the nonfarm egg production. Data on storage stocks at the beginning and end of each year include only United States holdings of shell and frozen eggs. Data on year-end holdings of dried eggs in past years are not available. Import data consist of shell eggs and the approximate shell-egg equivalent of dried and frozen egg products. Export data include shell eggs only. No large error is introduced, however, as the quantities not reported were small through 1940. The quantities of eggs used for hatching were estimated from the number of chickens raised annually in the United States and the average number of eggs required per bird raised.

3/ The estimated total output of chicken in the United States is based on the estimated quantity produced and consumed on farms and the quantity sold from farms, with a 10 percent addition to these two items to allow for nonfarm production. Total output in recent years also includes the estimated production of commercial broilers. Data on storage holdings include total stocks of poultry less ducks and turkeys when such classes were reported separately. The total quantity was converted to dressed weight, by assuming that blood-and-feathers loss averages 12 percent.

4/ The annual output of turkeys includes the quantity sold from farms and the quantity consumed on farms. Exports have been negligible and data are not reported separately. Dressed weight is determined by assuming that the blood-and-feathers loss amounts to about 9 percent of the live weight.

RETAIL FOOD PRICES, AUGUST-SEPTEMBER 1943

Retail prices of all foods combined increased 0.1 percent from August to September, compared with an increase of 0.4 percent in the total cost of living, as shown by the Bureau of Labor Statistics indexes. Food prices have increased 8.5 percent during the past year, or an average of 0.7 percent per month.

The most significant percentage changes in retail prices of foods from August to September 1943, together with the percentage changes for the same foods since September 1942, were as follows:

	Aug.-Sept. 1943	Sept. 1942-Sept. 1943
Green beans, fresh	+11.7	+31.9
Carrots, fresh	+11.1	+30.4
Eggs	+ 5.9	+13.6
Lettuce, fresh	+ 4.0	+ 4.8
Fish, fresh and frozen	+ 3.7	+26.7
Oranges, fresh	+ 3.0	+32.5
Apples, fresh	- 5.3	+72.6
Potatoes, fresh	- 6.0	+25.5
Spinach, fresh	- 6.7	+16.8
Onions, fresh	- 7.6	+62.2
Sweetpotatoes, fresh	-28.2	+59.4

Changes in prices of eggs and fresh fruits and vegetables from August to September were largely seasonal, with more-than-seasonal increases for green beans and carrots.

Sweetpotatoes are the only food included in the Bureau of Labor Statistics index that is not now subject to price control.

RETAIL PRICE CEILINGS ON FOODS, ISSUED OCTOBER 12-NOVEMBER 7, 1943

Date Issued	Food	Price ceiling
10-25-43	Sauerkraut, 1943 pack	Increase of approximately 1-1/2 cents per pound at retail, for small amount that will be available for civilians, based on adjusted price for sales by processors to reflect change in raw cabbage costs and wage rates. Effective 10-25-43. (MPR 306, Am. 18)
10-29-43	Peanut butter	Savings to ultimate consumers through mark-up regulation, amounting to 6-1/2 to 7 cents per pound, because of reduction of 4-1/2 cents per pound for sales by processors for containers of 2 pounds or less (subsidy to be paid by Commodity Credit Corporation). Effective 11-1-43. (MPR 335, Am. 4)

Date Issued	Food	Price ceiling
10-29-43	Apple cider	Increased price for ultimate consumers through mark-up regulation. Formula to be used by processors, until a new regulation is issued, that may result in prices as high as 50 percent over last year's. Effective 10-29-43. (MPR 233, Am. 6)
10-30-43	Turkeys	Increase of 1/2 to 3 cents per pound for dressed turkeys at retail, resulting from increase in maximum base prices for processed turkeys. Effective 10-30-43. (MPR 269, Am. 19)
10-30-43	Tree nuts	115 percent of net delivered cost at wholesale and 135 percent at retail, or freeze at Oct. 25-30 level (whichever is lower) until 1-3-44, pending a permanent pattern of control. For sales by growers, country dealers, processors, and shellers to all persons except country dealers and processors, in containers of more than 50 pounds (60 pounds for almonds), Zone 1 (west of Rocky Mountains), in shell, per pound, f.o.b. shipping point: Almonds, nonpareil, 48-1/2 cents; filberts, large (except Brixnuts), 28-1/2 cents; pecans, U.S. No. 1, extra large, 35-1/2 cents; pecans, seedlings, 20 cents; walnuts, first quality large, 31 cents. Zone II (east of Rocky Mountains), 1-1/2 cents higher, delivered. Differentials for other grades, container sizes, and for shelled nuts. Effective 11-3-43. (MPR 490 and Am. 1) New regulation.
11-1-43	Mincemeat	Increase of about 1-1/2 cents per pound at retail, resulting from recalculation of maximum prices of producers to reflect increased cost of raw apples. Effective 11-1-43. (MPR 262, Am. 11)
11-1-43	Imported fish	Probable reduction in prices for ultimate consumers, since retailers selling fish they themselves imported must apply mark-up to maximum price that would have been charged by primary fish shipper. Effective 11-6-43. (MPR 439, Am. 5)
11-2-43	Pickles (except fresh cucumber)	Increase for ultimate consumers through mark-up regulation, resulting from formula used by processors, based on 32 percent increase in prices of cucumbers over 1942 (average of $1.05 per bushel) and 20 percent increase for other vegetables. Effective 11-2-43. (MPR 488) Formerly under GMPR.
11-4-43	Butter, unsalted	Saving to ultimate consumers through mark-up regulation, based on reduction of 3/4 cent per pound in maximum price of processors. Effective 11-4-43. (MPR 289, Am. 22)

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